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ABSTRACT

This curriculum guide consists of materials for use in teaching a competency-based course to prepare students for employment in secretarial and clerical occupations. The instructional program prepares students to record and transcribe communications, provide administrative support, and abstract, classify, and file information. The first part of the guide contains introductory information, including a description of the development of the guide, an equipment list, a list of criteria for evaluating the mailability of typewritten or processed documents, a sample word processing concepts course outline, and a task list for steno/clerical occupations. The 101 tasks addressed in the guide are organized around the following 10 job duties: receiving, interviewing, and informing people; performing telephone operations; preparing and distributing mail; performing accounting, banking, credit, and payroll functions; preparing documents, correspondence, and reports; maintaining files, records and logs; duplicating and assembling documents; performing word processing skills; maintaining inventory; and maintaining machines and office equipment. Included in the task sheets are a task statement, achievement indicators, evaluation criteria, equipment list, student learning activities, and teacher activities. Completing the guide are sample student achievement records and lists of associations and educational resources. (KC)

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STENO-CLERICAL CURRICULUM GUIDE

INTRODUCTION

This secondary steno/clerical curriculum guide was developed through a project funded by the Michigan State Board of Education, Michigan Department of Education, Vocational-Technical Education Service. The project was located at Michigan State University in the College of Agriculture and Natural Resources' Education Institute (ANREI) and is known as the Curriculum Resource Team. The project was directed by Dr. Chris M. Olson, Curriculum Resource Team Coordinator, and monitorjed by Mary Hedges, Vocational-Technical Education Consultant.

While development of the curriculum guide was the responsibility of ANREI, every attempt was made to involve representatives of business and industry. A survey of 222 incumbent workers in 17 related occupational areas within the clerical and secretarial field was conducted throughout the state of Michigan. The final curriculum guide is representative of the tasks clerical and secretarial workers perform on the job as a result of that survey.

The steno/clerical handbook reflects CIP Code 07.0601 program description and the following job titles:

*CIP CODE	PROGRAM DESCRIPTION
07.0601	Secretarial and Related Programs

The secretarial and Related Instructional Program prepares individuals to record and transcribe communications, to provide administrative support, and to abstract, classify, and file information. Word processing skills is an integral part of the instructional program for all clerical/secretarial business education students.

The program will prepare students for employability in one or more of the following occupational areas:

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*CIP (Classification of Instructional Programs) replaces the previous United States Office of Education (O.E.) code structure.

JOB TITLE	**D.O.T. CODE
*1. Administrative Secretary	169.167-014
***2. Word Processing Correspondence Secretary	203.362-500
3. Stenographer (Communications Specialist)	201.362-030
4. Transcriptionist	202.362-014
5. Clerk Typist	203.362-010
6. Typist	203.582-066
7. Correspondence Clerk	209.262-010
8. File Clerk (Information Specialist)	206.362-010
9. Reprographics Clerk	207.682-010 207.582-014 207.685-014
10. General Office Clerk	209.562-010
11. Mail and Order Clerk	209.587-026 249.367-054
12. Receptionist and Communications System Operator	207.367-038
13. Shipping, Receiving, and Stock Clerk	219.367-030 219.367-034
14. Proofreader	209.387-030
15. Traffic, Rate and Transportation Clerk	214.587-014 214.362-038

*Administrative Secretary (AS):

A specialist who performs nontyping tasks, such as filing, processing the mail, handling telephone calls, and other supportive services for management. Also called administrative support secretary or administrative services specialist.[1]

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[1] Mona J. Casady, Word Processing Concepts (South-Western Publishing Company, 1980), p. 181.

**D.O.T. code refers to the Dictionary of Occupational Titles as developed by the U.S. Department of Labor.

The following job responsibilities and duties are performed most often (70 percent or more of the time) by Administrative Support Secretaries: composing written communications from oral directions; answering routine correspondence without directions; composing from employer's longhand notes; typing tables, speeches, reports, and news releases; answering the telephone; organizing flow of incoming mail; meeting callers; making appointments for employer; scheduling conferences and meetings; maintaining general and desk reference files; making recommendations concerning office systems, procedures, and supplies; and using a copy machine. More of the working time of Administrative Support Secretaries is spent in the area of written communications than in other areas.[2]

***Correspondence Secretary (CS):

A specialist who performs the typing, transcribing, and revising tasks for management.[3]

Word Processing Operators/Correspondence Secretaries are expected to provide "back-up" administrative support in organizations when needed.

The following job responsibilities and duties are performed most often (70 percent or more of the time) by Word Processing Operators/Correspondence Secretaries: typing letters, memos, and reports ten or fewer pages in length; typing original one-time correspondence; typing from handwritten input; typing documents requiring light revisions; proofreading typed documents; organizing and maintaining a filing system for stored or recorded data; logging work in and out; taking general care of office equipment; operating dictation equipment; using the dictionary and word processing manuals; and following the directions of supervisors. Considerably more of the working time of Word Processing Operators/ Correspondence Secretaries is spent on activities associated with typing and transcription than on tasks involving other functional office areas.[4]

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[2] Mona J. Casady, Word Processing Concepts (South-Western Publishing Company, 1980), p. 182.

[3] Scriven, et. al., Summary Report of National Study of Word Processing Installations in Selected Business Organizations (Delta Pi Epsilon, Publisher, 1981), p. 37.

The major competencies required by entry-level Correspondence Secretaries and Administrative Support Secretaries are:

1. Typing with accuracy from typed copy, from handwritten copy, and from rough draft within a satisfactory length of time.
2. Correctly applying grammatical and transcription rules in typing letters, memos, and other kinds of typing of varying lengths.
3. Following directions.
4. Listening.

Administrative Support Secretaries need these additional competencies:

1. Ability to use a filing system.
2. Ability to answer incoming telephone calls.
3. Ability to effectively meet and greet people.[5]

The following course designations will be used with the 07.0601, Secretarial and Related Programs, CIP Code:

Course 01 Stenography Laboratory. This instructional program prepares students for occupations concerned with minor administrative and general office duties in addition to taking and transcribing dictation. Course 01 will prepare students for secretarial occupations which require stenography to be used on the job or where stenography is a prerequisite for employment or promotion. The stenographic block will provide instruction for complex shorthand outlines and speed development. In addition, the following skills will also be taught: advanced typing, word processing concepts and skills; business spelling; business mathematics; English composition and grammar skills; electronic business machine skills; machine dictation and transcription; reprographics; mail techniques including electronic mail concepts; filing methods including micrographic concepts; telephone techniques; human relations skills; and employability skills. A prerequisite of one year of stenography is a recommendation for entry into the stenographic block.

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[4] Scriven, et. al., Summary Report of National Study of Word Processing Installations in Selected Business Organizations (Delta Pi Epsilon, Publisher, 1981), p. 37.

[5] Ibid., pp. 37-38.

Course 02 Clerical Laboratory. This instructional program prepares students for occupations concerned with general office duties. Heavy emphasis will be placed upon spelling, grammar skills, and machine dictation. All of the skills taught in the Stenography Laboratory will be taught in the Clerical Laboratory with the exception of stenography. A prerequisite of one year of typewriting is a recommendation.

Course 03 Legal Secretarial Laboratory. This instructional program prepares students to transcribe, from shorthand notes and/or machine dictation into typewritten mailable format, legal papers and correspondence such as summonses, complaints, motions, and subpoenas. The student will learn to keyboard, input, edit, and revise legal documents and correspondence utilizing word processing equipment. The student will perform secretarial duties utilizing a knowledge of legal terminology and legal procedures. The student will become familiar with law journals and legal publications. A prerequisite of one year of typewriting and stenography is recommended.

Course 04 Medical Secretarial/Medical Assisting Laboratory. This instructional program prepares students to perform secretarial, clinical, and laboratory duties in a medical office or other health care facility. Students will utilize medical terminology; learn hospital, clinical, or laboratory procedures; and understand legal and insurance forms. The student takes dictation in shorthand or uses a transcribing machine; and compiles and records medical charts, case histories, reports, and correspondence into typewritten mailable format. The student will learn to keyboard, input, edit, and revise medical records and correspondence utilizing word processing equipment. A prerequisite of one year of typewriting and stenography is recommended.

Course 05 Combination Laboratory. This instructional program will be designated for those programs operating as a combination of two or more of the above courses.

Course 06 *Co-op Related. Students electing co-op, who have previously taken two semesters of a two-hour block, may designate either two of the following options as their related class: (1) One hour of a two-hour block, provided the is individualized. (2) A one-hour co-op related class comprised of a related cluster of job skills.

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*See Appendix for Secretarial and Related Co-Op Guidelines.

Business and Office Cluster

Approved programs in the business and office cluster (07.9999) are a combination of the following programs: 07.010, Accounting and Computing; 07.0301, Business Data Processing; and 07.0601, Secretarial and Related Programs. The "cluster" concept is a comprehensive delivery system which affords students the opportunity to access employable skills in one or more occupations within Business/Office Education.

The following occupations are included within the Business and Office Cluster. *Tasks for remaining occupations are contained within their respective guides.

*Accounting and Computing Occupations

1. Inventory Control Clerk	D.O.T. 222.387-026
2. Cost Clerk	D.O.T. 216.382-034
3. Bookkeeper I	D.O.T. 214.382-014
4. Bookkeeper II	D.O.T. 210.382-018
5. Insurance Clerk II	D.O.T. 205.567-010
6. Classification Control Clerk	D.O.T. 210.382-030
7. Invoice Clerk	D.O.T. 214.382-014
8. Payroll Clerk	D.O.T. 215.482-010
9. Traffic Clerk	D.O.T. 214.362-038
10. General Ledger Bookkeeper	D.O.T. 210.382-046
11. Accounting Clerk	D.O.T. 216.482-010
12. Account Information Clerk	D.O.T. 210.367-010
13. Credit Clerk	D.O.T. 205.367-022
14. Billing Control Clerk	D.O.T. 214.387-010
15. Audit Clerk	D.O.T. 210.382-010

**Data Processing Occupations

1. Data Entry Operator	D.O.T. 203.582-030
2. Terminal Operator	D.O.T. 203.582-054
3. Computer Programmer	D.O.T. 213.362-010 (Bus: 020.162-014; Engr. Sci 020.167-022)

Secretarial Occupations

1. Administrative Secretary	D.O.T. 169.167-014
2. Word Processing Correspondence Secretary	D.O.T. 203.362-500

*Accounting and Computing Curriculum Guide

**Data Processing Curriculum Guide

3.	Stenographer (Communications Specialist)	D.O.T. 201.362-030
4.	Transcriptionist	D.O.T. 202.362-014
5.	Clerk Typist	D.O.T. 203.362-010
6.	Typist	D.O.T. 203.582-066
7.	Correspondence Clerk	D.O.T. 209.262-010
8.	File Clerk (Information Specialist)	D.O.T. 206.362-010 and 206.367-014
9.	Reprographics Clerk	D.O.T. 207.682-010, 207.682-014, 207.682-018, and 207,685-014
10.	General Office Clerk	D.O.T. 209.562-010
11.	Mailing and Order Clerk	D.O.T. 209.587-026 and 249.367-038
12.	Shipping, Receiving and Stock Clerk	D.O.T. 219.367-030 and 219.367-034
13.	Proofreader	D.O.T. 209.387-030
14.	Traffic, Rate, and Transportation Clerk	D.O.T. 214.587-014 and 214.362-038
15.	Medical Transcriptionist	D.O.T. 202.362-014
16.	Medical Secretary	D.O.T. 201.362-014
17.	Medical Assistant	D.O.T. 079.367-010
18.	Legal Secretary	D.O.T. 201.362-010
19.	Receptionist and Communications System Operator	D.O.T. 207.367-038

To foster the cluster concept, V-TES is exploring the development of occupational tasks for secretarial-related occupational disciplines. For example, Graphic Arts tasks for such occupations as communications specialist, forms designer, keyboard operator, keyliner, and offset press operator are being developed. When the curriculum is completed and disseminated, advanced secretarial students desiring these occupational skills may filter into the Graphic Arts Department to acquire supplemental skills which enhance the students' employability, provided the instruction is individualized.

According to the National Study of Word Processing Installations undertaken by Delta Pi Epsilon, the following are recommendations for business education departments.[6]

1. Business education departments should emphasize in their curricula (in order to prepare students better for entry level jobs in word processing) the following: typewriting with accuracy (at least 50 wpm), using transcription

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[6] Scriven, et. al., Summary Report of National Study of Word Processing Installations in Selected Business Organizations (Delta Pi Epsilon, Publisher, 1981), pp. 39-40.

equipment, using English correctly, listening and following directions, utilizing manuals, setting priorities, and working as part of a team.

2. Business education departments should emphasize the following in typewriting courses: formatting and document requirements; longer typing jobs with the use of a team approach on some of these jobs; simple and complex statistical typewriting; proofreading of typewritten work, letters, memos, and reports and typewriting from handwritten input of varying styles.

3. Because many of the organizations are using some form of work measurement, students should be exposed to various work measure practices and types of employee evaluations used in business (see Appendix).

4. Because word processing is expected to continue to grow rapidly, business departments should have as their goal the incorporation of vocabulary, organization, and competencies necessary for office workers to be successful in entry-level word processing positions either as word processing operators or as administrative support secretaries. Since entry-level tests are similar for both positions, schools can achieve their goals through a balanced secretarial program with secretarial procedures, magnetic keyboarding, machine transcription and shorthand. Shorthand may be particularly helpful for beginning employees in administrative support secretarial positions.

5. Business departments need to stress English skills to a much greater extent. At the same time, however, these fundamental weaknesses should be brought to the attention of the English departments and central administrators in order to determine what can be done in English courses and other courses to help more students develop greater facility in English usage.

6. Programs preparing persons for office positions should include a strong focus on the relationship between data processing and word processing. At a minimum level, this should include an overview of the two types of information systems, their similarities, their differences, and how they may interface operationally in the modern office.

7. Office workers, especially word processing employees, should be provided a strong background in data processing because of the increased interaction between word processing and data processing.

8. Many of the needed competencies should be learned on the job or on the job and in school. Therefore, educational institutions involved in the preparation of office workers should work cooperatively with organizations hiring word processing employees to see whether the schools' programs can be integrated with the needs of word processing installations in the area. This involves determining the job requirements, adapting the curriculum, and helping place students in jobs. Serious efforts should be made by both groups to develop internship programs and cooperative education programs.

9. Educational institutions preparing office workers should maintain close contact with word processing installations to determine changes taking place in career paths for word processing employees. While half of the organizations in this study do not have career paths at this time, many of the decision makers indicated they expect changes in career paths in their organizations. Since turnover is a problem in word processing installations as it is in office jobs in general, the career paths are likely to become more prevalent and definite, providing greater incentives for word processing employees.

10. Post secondary educational institutions should provide training supervision for office workers. In addition, they should offer assistance to organizations with their in-house training programs for word processing operators, administrative support secretaries, and supervisory personnel.

Throughout this curriculum endeavor, pilot teachers were encouraged to select student learning activities for all tasks which would improve student grammar, spelling, vocabulary, and punctuation deficiencies. While attempting to individualize the tasks to fit student needs, teachers should consult local advisory committee members to determine the kinds of student activities they think should be utilized to strengthen these skills. Advisory committees should be consulted to discuss the curriculum; some members might suggest appropriate evaluation criteria for various tasks relative to local business and industry standards.

Advisory committees and word processing associations should be consulted for leads when seeking co-op jobs. Local employers must be informed of a school's word processing program, especially if the program was recently established. Because of the high demand for word processing personnel, skilled students should have little trouble locating jobs.

Teachers must begin to communicate, work with, and learn from each other, especially in Business/Office Education. As data processing and word processing merge, data processing and word processing teachers should become more closely allied: teachers should become familiar with equipment in the respective occupations, secure mutual class speakers, explore team teaching techniques or utilize the "cluster" concept, rally as a unified business group to sharpen skills for Business and Office Education Clubs (BOEC) competitive events, etc.

One example of a team teaching curriculum approach, in an effort to reduce the teaching of duplicate tasks, is the Medical Office Curriculum Guide. The Medical Office Curriculum Guide is entitled Medical Secretary/Medical Office Assistant. As the title implies, tasks for the two occupations are represented. One method of teaching skills for both occupations is to "team teach" the clinical tasks to the entire group and subsequently "team teach" the administrative tasks to the same group.

Students must be able to choose various occupational goals; once those skills have been acquired, the program should be flexible enough to afford the student the opportunity to pursue additional occupational goals in a related business field. For example, if a medical secretarial/medical assistant student accomplished the tasks necessary for employability and then decided he/she wanted some business data processing skills, some logistical plan should be established to accommodate the student's interest. One method, requiring V-TES approval, is the Cluster Concept, identified as CIP Code 07.9999. Approved programs in the business and office cluster (07.9999) are a combination of the following programs: 07.0101, Accounting and Computing; 07.0301, Business Data Processing; and 07.0601, Secretarial and Related Programs. The "cluster" concept is a comprehensive delivery system which affords students the opportunity to access employable skills in one or more occupations within Business/Office Education. Programs under the cluster code include a comprehensive career development component. The "cluster" concept requires many changes in traditional program development and delivery. Modifications in facilities and curriculum are usually required.

We, as educators, must realize that "information processing" is an employment field in high demand, filled with various "career ladders." We must respond with instructional plans which will adequately prepare our students for the challenge of change (see Appendix for career ladders).

Some experts feel that the present word processing objectives will change by 1985.[7]

Professional and secretarial productivity will be scrutinized; workers will be expected to willingly adapt. Managers will no longer consider word processing equipment just a "document production" tool, but will view the equipment and process as a management tool and eventually become more comfortable with "high technology" equipment. Employers will scrutinize and re-evaluate their on-the-job training programs due to their need to train office staff on high technology equipment. Employers will begin testing for language arts skills in addition to typing skills to screen prospective word processing secretaries.

It is hoped that we will want to adapt to change and become more comfortable with high technology equipment as we attend word processing seminars, professional organization meetings, classes, vendor training programs, and read, read, read; thus, we can serve as the "change" example for our students and expect them to meet the challenge the year 2000 will bring.

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[7] "Survey Results: Getting Back on Course," Words, August-September, 1981, p. 32.

8. What is a task statement?

   It is a statement of job performance. It has six basic parts. They are:

   A. Worker actions that consist of one action verb.
   B. Worker actions that consist of an object of the action.
   C. Machines, tools, equipment, word aids, data, people, attitudes, knowledge.
   D. Purpose of worker action.
   E. Materials, products, subject matters, and services.
   F. Instructions and judgment.

9. How does the state of Michigan Core Curriculum relate to Competency-Based Education?

   A competency is defined as a knowledge, attitude, and skills necessary for effective job performance. Accordingly, the tasks identified are reflective of competencies needed by entry-level employees in selected occupational areas. Thus, the Guide is CBE.

10. Will V-TES mandate the Curriculum Guide?

    No, it is the philosophy of vocational education that all curriculum should be based on task research. Therefore, V-TES has developed a research-based Curriculum Guide which is encouraged as a resource for local curriculum planning.

11. How long does it take for a student to accomplish the Michigan Core Curriculum?

    Accomplishment of the job tasks included in the Guide will vary because of individual student abilities.

12. What happens when a student completes all the task statements in the Curriculum Guide?

    The Guide is designated as a resource for selecting tasks for your program in consultation with your advisory committee. It is not intended that any or all students should complete every task in the Guide.

    When a student completes task statements relative to his/her immediate occupational goal, a student may articulate into an accounting or data processing program to gain "cluster" skills, provided the training institution has adopted the 07.9999 CIP Code Program.

14. What is the Business and Office "Cluster"?

    Approved programs in the business and office cluster are a combination of the following programs:

    07.0101, Accounting and Computing; 07.0301, Business Data Processing and 07.0601, Secretarial and Related Programs. The "cluster" concept is a comprehensive delivery system which affords students the opportunity to access employable skills in one or more occupations within Business/Office Education. Cluster programs include a comprehensive career development component. The "cluster" concept requires many changes in traditional program development and delivery. Modifications in facilities and curriculum are usually required. Contact the V-TES Secondary Unit for additional information.

14. How are grades assigned to students using the Curriculum Guide?

Grading should be based on individual teacher assessment for level of competence. The task statements become just one element of a total grading scheme which includes attendance, tests, attitude, and other methods used to establish an individual student grade.

15. How can the Michigan secretarial and related occupational (07.0601) program teacher use the Guide?

Michigan secretarial teachers can use the Guide to adapt present course outlines and to establish a comprehensive student achievement record utilizing the task list and student certificate.

Tasks within the Guide should form the structure for a program. Current teaching materials can be interfaced with the appropriate tasks.

16. What are some advantages of the Secretarial and Related Occupational (07.0601) Program Guides?

Some of the advantages of using the Guide are:

A. Provides a suggested, easy to use guide for preparatory programs in steno/clerical, medical office/medical assisting, and legal office education.

B. Provides an easily understood curriculum for the business community.

C. Provides a curriculum that can be articulated with post-secondary educators or employers.

D. Provides a curriculum that can be transferred from one high school to another within the State.

E. Provides achievement indicators for performance evaluation.

F. Provides a student achievement record.

G. Provides a vehicle for BOEC competitive events.

The Michigan Department of Education, Vocational-Technical Education Service, is indebted to the following individuals who were instrumental in the development of the Steno/Clerical Handbook.

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EQUIPMENT LIST

CIP CODE 07.0601

SECRETARIAL AND RELATED PROGRAMS

The following list of equipment is based on a 22:1 student/teacher ratio. The secretarial laboratory should comprise 50 square feet per student.

*It is expected that prices will decrease through 1985 for text processing workstations, with annual average decreases in the 5% to 7% range.

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*"Technology: What's On the Horizon," Computerword OA, March 31, 1982, p. 46.

MAXIMUM EQUIPMENT FOR SECRETARIAL BLOCK LABORATORIES

MAXIMUM (IDEAL) EQUIPMENT

1. 22 Workstations
2. 22 Typewriters (electric, electronic, or keyboard terminal--microcomputer or word processor)
3. Wireless stenography laboratory
4. One inexpensive photocopier
5. 4 terminals
6. One Printer
7. 4 Printwheels (at least two styles)
8. 22 Disks (one per student) and 8 backup--total 30 disks
9. One dictation/transcription machine-for every 2 students
10. One electronic calculator for every 2 students
11. 4 Copyholders
12. 2 dozen ribbons (one per student)--fabric ribbons preferred over carbon multi-strike
13. One auto sheet feeder per printer (optional)
14. One continuous forms tractor per printer
    (continuous rough draft paper instead of loading printer)
15. Interoffice telephone (trainer) and communications line
16. Diskette file for teacher
17. Each workstation should consist of a keyboard, screen, CPU and disk drive; each student should have minimum page storage; each student should have storage capability to access 40 pages of stored material plus storage for program access; if workstation does not have disk drive, students can share the disk drive
18. Inexpensive continuous form (junk) paper 9 1/2" x 11"
19. 15 lb. continuous bond (1 box per printer)
    (less expensive and adequate; single part continuous)
20. OCR optional add-on
21. Phototypesetter optional (for skill centers, area centers, or high schools possessing graphic arts equipment) to tie-in with graphics program

Program Recommendations:

1. Programs should include a good scheduling plan so students will have adequate time to learn the basic word processing text-editing functions.
2. Equipment should be software upgradeable, disk drive, minimum 8-line screen and the ability to add on features such as telecommunications, data processing, accounting, and graphics.
3. Equipment should have expandable storage capability.
4. Equipment should have the basic text-editing features: format, automatic wraparound, centering, indent, decimal tab, cursor control, copy, move, insert, delete, headers, and footers.
5. School districts are encouraged to purchase the lower-cost systems.
   When purchasing equipment, districts should consider a clustered or shared system in an attempt to bring the cost down; systems sharing a printer should be investigated.
   School districts are encouraged to examine systems in the $8,000 range (exclusive of maintenance) or shared systems to bring the price down to this level, or lower, per keyboard. Microcomputers (an inexpensive approach) equipped with word processing software may be utilized in secretarial laboratories.
   Industry standard for calculating maintenance charges is approximately 10-12% of the total cost of the system per year.

MINIMUM EQUIPMENT LIST FOR SECRETARIAL PROGRAMS

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BY MARLY BERGERUD

WP CLASSROOM

Text-Editing Will Change With Time

IT WOULD BE STARTLING if someone said that the concept of word processing is dead. For many years the media has been preaching that text-editing is here to stay. The truth of the matter is that the word processing industry is very much alive; however, it will look different in the future than it has during the past 18 years.

In the 1960's and 1970's the emphasis in office automation was directed at improving clerical productivity. This was accomplished through the implementation of text-editing equipment located in centralized work environments. Functions of primary concern were playback speed of the printer, size of the CRT display, and size and types of storage. During this same period of time, educational institutions and business organizations began to implement text-editing curricula.

During the 1980's and 1990's the increased need for information, combined with decreased technological costs, expanded power of microprocessors, and storage capabilities will all change the emphasis of office automation. Therefore, technology today is moving toward increasing productivity of executives and all classes of office workers through the use of computer-based office systems.

The newer equipment will be easier to use, handle text and other applications, provide access to a variety of data bases, and instantly access information for executives within their companies. Therefore, some executives may choose to create their documents directly on to a computer-based office system.

Changes

The word processing concept should be placed in its proper perspective. Text-editing (as we have known it for the past two decades) is really a very small part of the entire office automation picture. Instead of being the only technology in the office, it will become one of the most important functions in a variety of office technologies.

Users may purchase text-editing equipment as a feature supplied by a multifunctional system, rather than an individual function of a full-fledged dedicated text-editing system. The multifunctional system will be a general purpose microcomputer, a terminal, or a basic work station.

The 1960's and 1970's style of organization for text-editing applications will probably change. It has already been altered by many companies where smaller centers are created to meet the needs of departments that can't support individual text-editing systems. Users will demand local centers (or work groups) that support fewer users.

Work groups that are located close to users will permit a better working knowledge and sometimes more dedicated service. Individual secretaries may also get electronic work stations so they can adequately support the activities of their supervisors. Executives will have work stations that will not only be used to access, analyze, and distribute information, but also to support the initial creation and revision of text documents.

Transitions

The word processing industry is in a transitional period and will become (in some ways) less important. It will stop being the focal point of office automation and take its place among a whole group of office activities. However, the importance of text-editing will increase as more people begin to utilize software to readily create and manipulate text.

Not only text-editing, but most office activities can be better supported through the use of computer technology. Multipurpose systems will permit the computer to become a reality for all office users, from clerks up to the highest executive levels. ☐

Marly Bergerud is a professor at Cypress College in Cypress, Calif., and president of Infopro, a word/information processing consulting firm in Los Alamitos, Calif. She is co-author of Word/Information Processing Concepts *and* Word Processing: Concepts and Careers, *published by John Wiley & Sons in New York City, and is a nationally known lecturer on education and industry.*

By MARLY BERGERUD

WP CLASSROOM

Educators Inform Students of Future Careers

THE ABILITY TO CREATE, manipulate, and communicate information through the use of microprocessor chips or computer systems may be referred to as computer power. Wide distribution of computer power is beginning to affect people everywhere. However, some fear that skills development and potential for growth may be restricted with such vast technological advancements. To reduce this concern, educators should make every attempt to inform students not only of word/information processing careers, but of the vast array of jobs being created through advancements in office automation.

For instance, video conferencing enriches communications by providing nonverbal (as well as verbal) communications breakdown. Teleconferencing allows meetings to occur between two or more people in separate locations. This provides information in a timely manner for better decision making and alleviates some travel.

New career paths

Word/information processing systems have enhanced the role of the office worker. Repetitive tasks can now be done by computer power thus freeing the worker to develop other talents such as data gathering, analysis, and composition.

Future technological innovations that could have a positive affect on student career paths are as follows:

- Teleconferencing will be commonly used in the future office. A flat narrow screen may be located on a wall and, ultimately, an entire wall may become the screen. The screen may be holographic (three dimensional) which would allow two groups to appear to be together at one table in one room when, in reality, the rooms, tables, and locations are separate.
- The role of the secretary will be elevated to that of the director of the office command and control center. This center may be a desk with multi-functional capabilities which enables the secretary to receive and send communications electronically by voice, data, video, or graphics. Voice recognition equipment will produce information either on hard copy or on electronic media.
- Paper will still be used, however, electronic media along with voice recognition will replace most needs for paper as a storage and retrieval device.
- The need to physically plug-in word/information processing devices into networks may be replaced by portable speaking and receiving systems.
- One day, portable electronic tablets may deliver reports, newspapers, and books, thus eliminating the need to visit a terminal to acquire and disseminate information. Sitting under a tree in a park or lazily eating lunch while reading a novel from a portable electronic tablet may soon be a reality.

Different applications

Computer power is bringing technological benefits to more areas than just the office. Microprocessor chips are used externally now in heart machines and may soon be improved so that they can be imbedded in the body. For instance, microprocessors may soon be used in prosthetic devices to activate limbs. Chips will also be used to improve vision, hearing, and the operation of other body parts. The application of biological computing devices is just the beginning.

Rapid technological innovations caused by computer power will require educators to assist students in understanding these changes and of their benefits to themselves and society. Students will then be more willing to accept change when it occurs. This interaction will provide educators an opportunity to illustrate clearly the benefits of new skill development and personal growth which can be derived from new technologies. □

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By MARLY BERGERUD

WP CLASSROOM

Text-Editing Systems Versus Microcomputers

TECHNOLOGICAL IMPROVEMENTS continue to increase the capabilities of office systems by bringing more computer power to the office environment. These improvements create a justifiable concern among educators as to whether students should be trained in word processing applications and operational techniques on dedicated text-editing systems or on today's microcomputers.

Many educators instruct students in word processing techniques primarily through the use of dedicated text-editing systems which are designed to perform very sophisticated office applications. However, several manufacturers have started to develop word processing software that can run on mainframe computers (many users), minicomputers (two or more users), or microcomputers (one user).

Sophistication

This advancement in software has presented instructors with the capability of teaching word processing concepts on microcomputers. The advantage is that microcomputers are significantly less costly than dedicated text-editing systems. Yet, current software developments for microcomputers are not as sophisticated or advanced as that found on dedicated text-editing systems.

Instructors should recognize that only basic word processing operational concepts can be taught using microcomputer software. Therefore, sophisticated skills and understandings necessary to achieve competence as a trained operator on today's office systems cannot yet be achieved on microcomputers. As the microcomputer, minicomputer, and mainframe software industries mature, so will the level of sophistication of text-editing programs.

Popularity

The underlying reason for the popularity of using microcomputers as teaching tools is its operating system. An operating system is a program of instructions, rules, and procedures that manage the way a computer works. Each computer's operating system is written in a machine language and may come on a diskette purchased from a supplier.

Each vendor of computer products has an operating system that comes with the hardware acquired when equipment is purchased. The various operating systems will recognize and accept only compatible applications programs written for its system.

The following are examples of operating systems:

- BASIC and Apple DOS. The operating system that comes with the Apple IIs is called BASIC. It allows users to program the machine language of BASIC and run those programs. Apple DOS is an expanded operating system that handles running the disk drive when a drive is added to the Apple II microcomputers. If users acquire add-on cards for the Apple, it is possible to run other operating systems such as CP/M.
- CP/M. This operating system (an acronym standing for Control Program for Microcomputers) was one of the first to be developed in the mid-1970s. Because of this, many hobbyists and engineers over the years have designed a variety of applications programs to run under CP/M. It has since become a standard operating system in the industry and is installed on many existing microcomputers. Other operating systems such as CP/M-86 and MP/M have been developed to compliment CP/M so that it can be driven on other office systems.

Educators must look at skills training and determine whether they want to pass along a basic understanding of text-editing through the use of microcomputers, or a more detailed, comprehensive level of competence in word processing applications by way of dedicated text-editing machines. ☰

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*MAILABILITY CRITERIA

Criterial for the Evaluation of Typewritten or Processed/Generated Documents in Secondary Secretarial Programs.

Method of Evaluation: Three levels of mailability:

A. M + - Mailable, perfect
B. M - Mailable
C. NM - Not mailable

A. "Mailable +" Standards

1. Document contains no visible errors.
2. All instructions are correctly followed.
3. All errors are corrected--misspellings, typographical errors, incorrect punctuation, incorrect capitalization, incorrect syllabication.
4. Document contains no omission in the body, opening, or closing lines.
5. Document is neatly completed and document parts are well placed on the page.

B. "Mailable" Standards

1. All instructions are correctly followed.
2. Document contains no uncorrected errors--misspellings, typographical errors, incorrect punctuation, incorrect capitalization, incorrect syllabication, or incorrect word division.
3. Document contains neatly made corrections.
4. Document contains less than ideal placement or spacing on page.
5. Document contains omission of enclosure notation or reference initials.
6. Document contains acceptable (but not most desirable) use of capitalization or punctuation.
7. Document contains an omission or addition of word/words which do not change the meaning of a sentence.

C. "Not Mailable" Standards

1. Instructions were not followed.
2. Document contains uncorrected typographical errors.
3. Document contains uncorrected strikeovers.
4. Document contains obvious corrected strikeovers.
5. Document contains neatly made but excessive/visible strikeovers.
6. Document contains misspelled words.
7. Document contains punctuation or capitalization violations.
8. Document contains grammar violations.
9. Document contains undersirable division of words.
10. Document contains omission or addition of word/words which change the meaning of a sentence.

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*Reprinted and revised with permission of the National Office Education Association.

11. Document displays incorrect page placement or spacing.
12. Document contains omission of some part of the document: date, inside address, etc.
13. Document contains distracting corrections such as obvious use of liquid paper or correction tape, smudges, hole in paper, poor alignment, or incomplete erasures.

Questions and Answers for the Secondary Secretarial and Related Occupational (07.0601) Curriculum Guides

1. What are the Michigan secretarial and related occupational (07.0601) program guides?

   The curriculum guides are a list of duties, task statements, achievement indicators, criteria, tools, equipment, and resources that provide the base for a secretarial office education preparatory curriculum for selected entry-level secretarial/clerical occupations. It does not provide specialized competencies for each job title nor all the various occupational areas found in secretarial and related occupational programs.

2. Why was there a need to develop a Michigan Curriculum Guide?

   It was necessary to design a Michigan Curriculum Guide so that teachers would have a research-based common core of competencies to teach in secondary secretarial and related occupational (07.0601) programs.

3. How were the Secretarial and Related Occupational (07.0601) Program Guides developed?

   The Guides were developed throughout 1980-81 and 1981-82 school years by a review team of business and industry, high school, community college, university, and state personnel.

4. Why was occupational research used as a basis for the Curriculum Guide?

   Vocational education curriculum must be based on occupational analysis. Job duties and tasks are used by industrial, educational, governmental and private agencies, and employee organizations for the planning of educational programs.

5. Are there alternatives to using the Curriculum Guide?

   Yes, but since vocational education curriculum is based on occupational analysis, it would be necessary to conduct task analysis, identify competencies, validate competencies, construct and field-test instructional materials, evaluate and provide instruction. Few, if any, instructors or districts have the ability to do this kind of activity.

6. When should Michigan secretarial and related occupational (07.0601) program teachers begin to use the Curriculum Guide?

   Since the new Guide essentially replaces the old Michigan Minimum Performance Objectives, instructors should begin as quickly as possible to incorporate the features of the Guide into present course content and outlines.

7. Will task statements replace Michigan Minimum Performance Objectives?

   Yes. It is the intent of the Michigan Department of Education, Vocational-Technical Education Service, to adopt the task format to replace the Michigan Minimum Performance Objectives.

WORD PROCESSING CONCEPTS COURSE OUTLINE EXAMPLE

The Word Processing Concepts Outline is a recommended sample of topics which should be discussed with students prior to introducing them to actual "hands on" word processing machine skills. Depending upon the skill levels and abilities of the students, it is conceivable that one marking period could be devoted to this project.

It is recommended that teachers review language art skills -- punctuation, capitalization, number usage, syllabication, and word division, spelling, and sentence and paragraph structure prior to the "hands on" machine experience.

The outline can be completed and updated by utilizing the sources contained in the Bibliography of this handbook.

The Michigan Department of Education, Vocational-Technical Education Service, is indebted to Marilyn Popyk -- Director/Instructor, Word Processing Studies, Business and Economics Department, Henry Ford Community College, Dearborn, Michigan -- for authoring the Concepts Outline.

WHAT IS WORD/INFORMATION PROCESSING

I. What is information?

- A. Written
- B. Verbal

II. What is a document?

III. Kinds of documents

- A. Quick/short
- B. Repetitive
- C. Lengthy, text-edited
- D. Boilerplates/canned library

IV. The Office Automation Revolution

- A. The Beginning
- B. MT/ST and typing production
- C. The Word Processing movement
- D. WP is either the focal point of the communications or a major part of the communication/information system

V. Definition

- A. People
- B. Standardized Procedures
- C. New Equipment

VI. Word Processing Cycle

- A. Origination (Input)
- B. Processing (Output)
- C. Reprographics (other methods of output)
- D. Distribution
- E. Storage/Retrieval

VII. Who Uses WP

- A. Managers
- B. Secretaries
- C. Publishers/Editors/Authors
- D. Lawyers
- E. Doctors
- F. Everyone

VIII. Industry Applications

A. Law Firm
B. Medical Hospital
C. Government
D. Insurance Company
E. Publishing Company
F. Advertising
G. Banking

IX. Personnel

A. WP Operations Manager
B. Administrative Support Manager/Supervisor
C. Production Manager/Supervisor
D. WP Specialist
E. Senior WP Specialist
F. WP Center Supervisor
G. Office Services Manager
H. Proofreader

X. Career Opportunities

A. Across the board, in every industry, WP enables people to create and build a career
B. New Titles
C. Job Enrichment

OFFICE ENVIROMENTS

I. Traditional Office Structure

  A. Basic one employer/one secretary relationship
  B. Going by the wayside
  C. Reorganization changes tasks and creates career paths

II. Centralized System (Document Production Center)

  A. Major center services company
  B. Reorganization of tasks
  C. Emphasis on production

III. Decentralized/Networks/Satellites/Work Clusters

  A. Satellite services and supports an individual department
  B. Charge back procedures

IV. Alones

  A. One or two secretaries support a managerial cluster (5 or 6 executives)
  B. Closer to authors: Secretary "ship" returns
  C. Secretaries may share a word processor

ORIGINATION (INPUT) - PHASE I OF WORD PROCESSING CYCLE

- I. Who Creates
  - A. Authors/Principals/Originators
  - B. Methods--advantages and disadvantages of each
    - 1. shorthand
    - 2. longhand
    - 3. rough draft
    - 4. machine dictation
    - 5. computer dictation
    - 6. computer aided transcription
  - C. Why--creation of an idea expressed in words
- II. Dictation Equipment Media
  - A. Magnetic Media
    - 1. discs
    - 2. belts
    - 3. cassettes
      - 1. standard
      - 2. mini/micro
  - B. Discrete Media
    - 1. magnetic--erasable
    - 2. inscribed
  - C. Endless loop (continuous flow)
    - 1. permanently encased in a tank
    - 2. phone access
- III. Categories of Dictation Equipment
  - A. Desk Top Units
    - 1. dictation
    - 2. transcription
    - 3. combination
  - B. Portable
    - 1. mini/micro--cassettes
    - 2. can dictate anywhere
    - 3. self-contained

C. Central Recording System

1. endless loop--eliminates handling of media
    - a. individual system or
    - b. centralized system
2. phone access
3. hospital, for example
    - a. phones in surgery room, emergency room, doctor's lounge, chapel, etc
    - b. 24-hour dictation service
    - c. dictate patient's condition immediately
4. standard cassette recording systems
5. supervisors central monitor

IV. Dictation Equipment Features

- A. Automatic gain control
- B. Automatic measured review
- C. Electronic cueing and index slips
- D. Voice Operated Relay
- E. Privacy Lockout

PROCESSING

I. Steps in Preparation

   A. Make-ready (set-up transcriber, gather supplies, etc.)
   B. Doing (typing/producing, decision making)
   C. Put-away (tools and supplies)

II. Production

   A. Decisions

      1. format
      2. end-of-line
      3. end-of-page
      4. word selection
      5. which job to do first
      6. how to spell the word
      7. when to begin new paragraph

   B. Evolution of WP Equipment

      1. MT/ST
      2. Magnetic Cards
      3. Cassette
      4. Memory typewriter
      5. Electronic "intelligent" typewriter
      6. Display systems
      7. Time sharing

   C. Natural language keyboard--special computer language not necessary to make machine operate

   D. Operational classifications of systems

      1. menu
      2. coded

III. Review

   A. Revision--authorship changes
   B. Proofreading skills
   C. Typographical errors

IV. Keyboarding - inputting information on electronic/automated unit

COMPONENTS OF WP SYSTEMS

I. Standalone

   A. Self-contained--not hooked up to nor share the processing power of a central computer
   B. Components

      1. keyboard with function key pad/cursor pad
      2. printer
      3. storage console--utilizing floppy disks

   C. Automatic Features

      1. wraparound
      2. erase/backspace
      3. center
      4. decimal tab
      5. indent
      6. global search/replace
      7. moving text
      8. copy text
      9. pagination
      10. right margin justification
      11. merge
      12. add/delete
      13. many, many more

II. Floppy Disks

   A. Mylar coated to capture keystrokes
   B. 5-200 pages of storage
   C. Care and Handling

      1. do not touch the diskette surface
      2. only handle the diskette on the top, near the label
      3. do not use solutions: alcohol, thinner, Freon, etc. to clean the diskette
      4. do not use magnets or magnetized objects near the diskette, can cause loss of data
      5. do not bend or fold the diskette
      6. do not place objects on top of the diskette
      7. do not use rubber bands or paper clips on the diskette
      8. do not write on a label on a diskette. Write the label first, then place it on the diskette
      9. do not use erasers on the diskette
      10. place I.D. labels correctly, never use layers
      11. insert carefully by grasping upper edge and placing diskette into the drive (label facing up)
      12. keep diskette in its protective envelope when not being used
      13. diskette should be stored in their box and set upright when not being used
      14. do not expose diskettes to excessive heat or sunlight
      15. if transported, the diskettes should be kept in envelope and box

WORD PROCESSING SYSTEMS

I. Intelligent Typewriter
  - A. Microprocessor/programmable
  - B. Automatic WP functions
    1. erase backspace
    2. center
    3. decimal tab
    4. pagination
    5. carrier return
    6. indent
    7. format/phrases/sentences
  - C. Storage media
    1. diskettes/mini floppy disks
    2. 5 to 75 pages
  - D. May gradually replace regular typewriters
  - E. Fits on the secretary's desk
  - F. Much easier learning required than blind standalones

II. Blind Standalone
  - A. Self-contained unit includes
    1. keyboard
    2. printer
    3. storage media
    4. logic to perform WP functions is hardwired
  - B. No visual display
  - C. Storage media may be
    1. cards
    2. cassettes
    3. tapes
    4. memory
  - D. Advantages
    1. more capabilities
    2. compatibilities
    3. can add options
  - E. Disadvantages
    1. takes more space
    2. more expensive
    3. more difficult to learn
    4. no visual capability
    5. slower
    6. not state-of-the-art technology

III. Display Standalone

A. Self-contained unit

1. keyboard
2. printer-separate from keyboard and display
3. `sotrage media-floppy disk or mini floppy disk
4. visual display (CRT)
5. internal processing unit

B. Visual display, CRT - cathode ray tube--may be:

1. 24 - character
2. one line
3. six lines
4. partial page
5. full page
6. dual page

C. Displays vary from

1. black on white
2. green on green
3. gray on green
4. white on green
5. amber on brown
6. nonglare screens

D. Advantages of displays

1. see document during creation
2. proofread, correct, revise before printing
3. can see correction when revising rather than strike overs
4. printing and keyboarding can occur simultaneously

E. Disadvantages of displays

1. more expensive than blind
2. eyestrain, fatigue

F. Advantages of display standalone

1. easier to learn
2. easier to use
3. more capabilities
4. can add options
5. state-of-the-art technology

G. Disadvantages

1. more expensive
2. takes more space
3. requires some internal organization changes

IV. Shared Logic

A. Mini computer performs the logic for multiple workstations; referred to as CPU or Central Processing Unit
B. Optional peripherals

1. additional equipment attached
2. printers
3. OCR
4. phototypesetter
5. greater processing power

C. If CPU goes down, they all go down
D. Software based system
E. Hard disk storage: floppy disk archives
F. Advantages

1. can achieve more productivity
2. more capabilities
3. can share long jobs
4. can achieve more cost effectiveness

G. Disadvantages

1. requires management
2. requires well-supervised procedures
3. requires considerable teamwork
4. high startup costs

V. Shared Resources

A. Independent workstation

1. individual storage
2. not dependent on CPU

B. Shares resources such as

1. volumes of hard disk storage
2. greater processor power
3. printers
4. OCR

VI. Time-Sharing

A. Sharing storage and processing capability for a mainframe computer
B. Word processors serve as terminals to input and send in revisions
C. Subscribers buy time on another organization's computer equipment
D. Makes it possible to send information on other brands of equipment

E. Advantages

1. more capability of functions
2. increased storage capacity
3. lower startup costs

F. Disadvantages

1. requires more skill
2. requires more procedures
3. more technical

OUTPUT - PHASE III OF WP CYCLE - REPROGRAPHICS

I. Impact Printing Devices

   A. Device strikes paper through inked or carbon ribbon; relatively slow and noisy
   B. Daisy Print Wheel

      1. bidirectional
      2. characters on petals
      3. print rapidly; good quality
      4. 350-650 words per minute
      5. variety of typestyles

   C. Thimble

      1. durable and reliable
      2. can print in two-ten languages during same print run
      3. spinwriter appearance

   D. Line

      1. most commonly used as a computer output device
      2. speeds vary from 100 to 3,800 lines per minute
      3. high speed with good quality

   E. Dot Matrix

      1. grouping of tiny rods mounted like hairbrush bristles in a rectangular base (matrix)
      2. selected rods push against paper forming pattern of desired character
      3. 230 lines per minute
      4. can also produce multicolor printing on paper

II. Nonimpact Printers

   A. No printing device hitting the platen; almost noiseless
   B. Ink Jet

      1. characters shaped by spraying of ink onto paper
      2. ink must dry by being absorbed into paper
      3. great demand due to:

         a. high--volume form letters with automatic paper and envelope handling
         b. very high playout speed
         c. excellent original print quality

      4. limitations

         a. does not create carbon copies or masters for reprographics
         b. quality ranges of paper that can be used is limited

C. Intelligent Printer/Copier

1. combines laser, computer, some photocopying technology
2. printer/copier combines photocopying and printing features

D. Laser

1. intense, narrow beam of pure red light capable of carrying millions of messages simultaneously
2. possible to design and store in the printer custom-made company logs, type styles, letterheads, business forms, etc.
3. features of some include:
    a. printing on both sides of paper
    b. provide output on film
    c. print information sent to it from a film or from compatible pieces of WP equipment

E. Fiber Optics

1. glass--like tubes as thin as strands of human hair
2. sends light source from one location to another
3. light intensities changed to signals through tubes
4. features
    a. higher quality documents
    b. greater speeds

F. Other Methods of Reproducing Documents

1. repetitive printing
2. carbon
    a. least expensive
    b. must use impact printer
3. photocopier
4. copier/duplicator
5. lithographic
6. offset
7. facsimile
8. phototypesetter
9. spirit

DISTRIBUTION - PHASE IV OF WP CYCLE

I. Electronic Mail/Telecommunications

- A. Getting document from one point to another in fastest way possible/communications
- B. Documents spend 74% of time in distribution
- C. Definition--any information distributed electronically over telephone lines
- D. Information can be sent electronically in the form of:
  1. voice
  2. data
  3. graphic or image
  4. video
- E. Bypass the post office due to its slowness

II. Electronic Mail Systems

- A. Communicating Word Processors
  1. compatible equipment
  2. telephone through use of modems
  3. can be used to assemble a report from several locations
- B. Teletypewriter Network
  1. TMX and Telex
  2. TWX transmits faster than Telex
  3. teleprinter exchange service of Western Union
  4. teletypist phones another teletypists at distant location
  5. once connection made, teletypists communicate by typing back and forth while the machines record their messages in writing
  6. economical way of sending international messages
- C. Mailgram
  1. Western Union service that combines telephone and U.S. mail
  2. message received during day stored in CPU of Western Unions computer for transmission during night
  3. mailgram inserted in window envelope
  4. dispatch by postal service next morning
  5. can be used in sending messages to customers, suppliers, and distributors not on TWX/Telex network
- D. Facsimile (also used as a form of reprographics)
  1. graphic communications
  2. sends original document from one location to a remote location where it is reproduced
  3. also referred to as "telecopiers"
  4. sends handwritten text and numbers, photographs, signatures, drawings, charts, graphs

E. Satellite

1. use of satellites to act as a nationwide computer
2. enable mail services to be channeled through the sky
3. earth stations beam radio waves
4. tremendous speed of transmission

F. Voice, store and forward systems

G. Teleconferencing

STORAGE/RETRIEVAL - PHASE V OF WP CYCLE

I. Records Management Systems

A. Use of new automated filing equipment and supplies
B. Alternative methods of traditional filing
C. In addition to paper records it includes:

1. magnetic media
2. microfilm systems

II. Traditional Filing Systems

A. Files

1. vertical
2. lateral/open shelf

B. Systems

1. centralized
2. decentralized

C. Kinds

1. alphabetic
2. numeric
3. geographic
4. subject
5. soundex

III. Micrographics: The File of the Future

A. What is it:

1. reduction of document
2. process places documents on microform
3. saves 95% to 98% of space needed to share hard copy document

B. Kinds of microforms

1. microfiche
2. microfilm
3. aperature card
4. microfilm jacket

C. Microfilm

1. keeps old records referred to infrequently
2. kept in less spare than hard copy
3. governmental agencies will accept microfilm in place of hard copy
4. reduces filing time; can be scanned
5. can't make margin notations
6. reduces number of misfiled documents

D. Aperture Card

  1. has opening in which a strip or frame of microfilm is mounted
  2. indexing on paper portion of card

E. Microfilm Jacket

  1. folder consisting of clear material sealed together on two sides
  2. can store approximately 60 to 70 documents
  3. frames easily inserted at any time
  4. updating of files at any time

F. Microfiche

  1. sheet of film containing several hundred exposures
  2. used for publications or reports frequently referenced
  3. additions/deletions can easily be done

G. Optical Disk

  1. laser techonology
  2. thousands and thousands of storage pages

IV. Why records retention programs

A. Determines how long documents should be stored on media
B. Determines how long documents should be retained in a paper file
C. Purging--process of eliminating unnecessary files
D. Filing and retrieval constitute a great portion of paperwork costs

V. Storage of magnetic media

A. By author's last name or author's initials
B. Department

  1. sales
  2. accounting
  3. research and development

C. Documents

  1. memos
  2. letters
  3. reports, etc.

D. Index should be prepared and printed copy attached to media

WORK MEASUREMENT

I. Why

   A. Enables managers to recognize high and low work periods
   B. Evaluate production of employees

II. Daily Work Logs

   A. Kept by employee
   B. Overall production on weekly, monthly or yearly basis
   C. Work measured by

      1. line or
      2. document page or
      3. number of documents

III. Work Standards

   A. Provide basis for comparing production of employees
   B. Represent average amount of work expected per employee or per machine
   C. Many companies base weekly salaries on amount of work employees are able to produce
   D. Bonuses for work produced above average weekly quotas

IV. Production Reports

   A. Summaries of amount of work produced
   B. Play important role in control and supervision of the WP center
   C. Help supervisors balance workloads

TASK LIST
FOR
STENO/CLERICAL HANDBOOK

A. RECEIVING, INTERVIEWING, AND INFORMING PEOPLE

1. Receive people using receptionist skills to determine the nature of the visit.

2. Collect information using telephone and/or appropriate forms to insure completion of documents.

3. Answer questions using telephone and proper telephone techniques, verbal communication skills, resource materials, and/or knowledge of the organization to provide information.

4. Schedule appointments using communication skills and appointment calendar to arrange appointments and meetings.

5. Interview people using communications skills to obtain and/or convey information

6. Question originator using communication skills to determine task requirements of originator.

7. Locate workers using verbal or written communication skills to verify workers' attendance on job.

B. PERFORMING TELEPHONE OPERATIONS

1. Receive call using telephone switchboard to provide information.

2. Route calls using telephone switchboard to connect caller with appropriate party.

3. Place call using telephone switchboard to connect caller with appropriate party.

4. Page establishment personnel using the paging system to call individuals to phone.

C. PREPARING AND DISTRIBUTING MAIL

1. Process mail and documents using manual techniques to prepare mail for distribution to proper location or files.

2. Route mail and documents to the proper location using an organizational directory or reference materials.

3. Collect mail and documents to address and stuff for processing and/or delivery.

4. Apply postage using manual techniques to prepare mail for delivery.

D. PERFORMING ACCOUNTING, BANKING, CREDIT, AND PAYROLL FUNCTIONS

1. Receive cash and checks using knowledge of monetary denominations to accept as a deposit in a customer's account or as a payment on a customer's bill.
2. Cash checks using knowledge of monetary denominations and negotiable instruments to exchange for cash.
3. Deposit cash and checks using appropriate forms and written or verbal communication skills to entrust employer's money to bank for safe-keeping.
4. Sell money orders, traveler's checks, and savings bonds using written and verbal communication skills and appropriate forms to provide service to customers.
5. Prepare payroll using time sheets and record of payrate to provide pay to employees.
6. Open accounts using written and verbal communications skills and appropriate forms to provide service to customers.
7. Issue statement using appropriate forms and handwritten techniques or keyboard equipment to report amount due from customer.
8. Restrict customer's usage of account using handwritten techniques, keyboard equipment, or rubber stamps to retrieve uncollected funds from customer.
9. Compute data using knowledge of business math operations and appropriate rate books to determine gross earnings, deductions, and net earnings.
10. Compute data using knowledge of business math operations and appropriate rate books to determine commissions.
11. Compute data using knowledge of business math operations and appropriate rate books to determine discounts, payment, credits, and debits.
12. Compute data using knowledge of business math operations and appropriate rate books to determine interest rates.
13. Calculate data using adding machine or calculater to determine gross earnings, deductions, and net earnings.
14. Calculate data using adding machine or calculator to determine commissions.
15. Calculate data using adding machine or calculator to determine discounts, payments, credits, and debits.
16. Calculate data using adding machine or calculator to determine interest rates.

E. PREPARING DOCUMENTS, CORRESPONDENCE, AND REPORTS

1. Format information using forms to prepare letters, labels, documents, forms, or statistical reports.
2. Type information using typing equipment and appropriate forms to prepare letters, labels, documents, forms, or statistical reports.
3. Take dictation using shorthand, speedwriting or stenotype techniques and appropriate equipment to prepare typewritten documents.
4. Transcribe materials using mechanical equipment to prepare documents.
5. Transcribe dictation using written and verbal communication skills and/or mechanical equipment to prepare documents according to the originator's specifications.
6. Examine documents using visual and written communication skills to verify completeness, accuracy, authenticity, and format.
7. Review documents using visual and written communication skills to determine how to incorporate proposed changes.
8. Scan incoming correspondence using visual communication skills to highlight major facts within correspondence.
9. Review incoming correspondence using visual and written communication skills to formulate reply.
10. Collate documents using manual techniques to assemble documents in proper sequence.
11. Collate document using mechanical equipment to assemble documents in proper sequence.
12. Staple documents using mechanical equipment or manual techniques to fasten documents.
13. Compose correspondence using verbal or written skills and appropriate forms to communicate information to correspondent.
14. Compose correspondence using verbal or written skills and appropriate forms to request information from correspondent.
15. Produce documents using composition skills and appropriate terms to communicate information.
16. Prepare worksheets using composition skills and appropriate forms to communicate information.

E. PREPARING DOCUMENTS, CORRESPONDENCE, AND REPORTS (cont)

17. Arrange data using established guidelines to organize information in a tabular form.

18. Categorize data using established guidelines to classify information.

19. Number documents using mechanical equipment or manual techniques to sequence pages.

20. Prioritize jobs using priority schedules to produce documents on a timely basis.

21. Gather data using reference materials and resources to compile document information.

22. Compile reports using appropriate forms, reference materials, resources, and composition skills to provide information.

F. MAINTAINING FILES, RECORDS, AND LOGS

1. Maintain records and files using knowledge of records, management procedures to store information.

2. Maintain records and files using knowledge of records management procedures to retrieve information.

3. Maintain records and logs using knowledge of records management procedures to produce production reports or cost accounting reports.

4. Maintain records and logs using knowledge of records management procedures to control work flow.

G. DUPLICATING AND ASSEMBLING DOCUMENTS

1. Duplicate documents using copying machine to reproduce information.

2. Photograph documents using microfilming device to reproduce documents or microfilm.

H. PERFORMING WORD PROCESSING SKILLS

1. Perform magnetic media (disk, diskette, cassette, card) maintenance routines using knowledge of system operations to maintain file media.

2. Activate word processor using appropriate control keys to prepare equipment for processing of information.

3. Load software using appropriate commands to access software functions.

4. Input information using keyboard to record documents.

H. PERFORMING WORD PROCESSING SKILLS (cont)

5. Input information using keyboard to store documents.
6. Enter stored media keyboard commands to retrieve/recall text.
7. Enter instructions using keyboard commands to print documents.
8. Enter stored media using keyboard to revise text.
9. Enter stored media using keyboard commands to communicate information.
10. Copy (stored) data using mechanical equipment to manual techniques to duplicate information from one document to another.
11. Record information using mechanical equipment or manual techniques to maintain a record of the information.
12. Maintain records and files using knowledge of records management procedures to store information.
13. Maintain records and files using knowledge of records management procedures to retrieve information.
14. Maintain records and files using knowledge of records management procedures to purge information.
15. Maintain records and logs using knowledge of records management procedures to produce production reports.
16. Maintain records and logs using knowledge of records management procedures to control work flow.
17. Maintain records and logs using knowledge of records management procedures and mechanical techniques to provide cost accounting reports.
18. Trace missing records and file folders using knowledge of the organization, records management procedures, and/or telephone to maintain an accurate and functional filing system.
19. Locate and retrieve information using reference materials and a programmed software package to process a document.
20. Select blocks of information using text editing techniques to prepare a new printed document.
21. Assemble information from any media using keyboard techniques to create a new printed document.
22. Originate forms using word processing software/hardware to meet requester's needs.
23. Program forms using word processing software/hardware to fill-in the pre-printed forms.

H. PERFORMING WORD PROCESSING SKILLS (cont)

24. Program document formats using word processing software/hardware to develop a new printed document.
25. Process management records using word processing software to generate production information.
26. Sort information using programmed software to sequence records within a stored file.
27. Select information using programmed software to retrieve specific records from a stored file.
28. Manipulate files using keyboard commands to merge stored information from any file(s) into another file.
29. Perform mathematical calculations using keyboard and programmed software to verify document information.

I. MAINTAINING INVENTORY

1. Receive supplies and materials using inventory control forms to maintain recommended inventory levels.
2. Sort supplies and materials using inventory control forms to verify receipt and condition of items on requisition and/or purchase order/invoice.
3. Adjust supplies and materials using inventory control forms to replace damaged or defective supplies and materials.
4. Store supplies and materials using inventory storage forms to maintain recommended inventory levels.
5. Issue supplies and materials using knowledge of stockroom inventory and appropriate forms to fill requisition orders.
6. Order supplies and materials using inventory control procedures and appropriate forms to maintain recommended inventory levels.
7. Distribute supplies and materials using mechanical equipment or manual techniques to provide workers with supplies and materials.
8. Mark supplies and materials using inventory labels or markers to identify supplies and materials.
9. Measure supplies and materials using inventory control forms and measurement devices to verify conformance of items on requisition and/or purchase order/invoice to specifications.
10. Count supplies and materials using inventory control forms to verify receipt of items on requisition and/or purchase order/invoice.

J. MAINTAINING MACHINES AND OFFICE EQUIPMENT

1. Perform equipment maintenance functions using appropriate materials to maintain systems operations.

2. Analyze equipment malfunction using a knowledge of system operations to determine if malfunction can be corrected by the operator or is to be reported to a service firm.

3. Perform routine equipment maintenance functions using manufacturer's instructions to maintain systems operations.

Duty: Receiving, Interviewing, and Informing People	**Duty No.** A **Task No.** 1

Task: Receive people using receptionist skills to determine the nature of the visit.

Achievement Indicators: The learner:

	Yes	No
1. Greeted the visitor courteously -	____	____
2. Interviewed visitor to determine purpose of visit -	____	____
3. Showed interest in the visitor and the situation -	____	____
4. Gave clear directions and information -	____	____
5. Maintained company policy regarding visitors -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:	**Resources:** See Bibliography.

A-1

Teacher Activities	Student Learning Activities
1. Prepare and administer a "frame of reference" questionnaire. Discuss. 2. Visit the school's receptionist and have him/her demonstrate how he/she receives visitors. Discuss. 3. Visit a local company's receptionist or invite them in to talk about how he/she receives visitors and what tools they use. Take slides or video-tape for future use. Prepare and administer field trip evaluation sheet. 4. Demonstrate proper and improper speech habits used in business. Prepare and correct exericse. 5. Demonstrate and discuss the importance of non-verbal communication in business. Prepare and correct exercise. 6. Discuss the importance of appearance in business. Prepare and correct exercise. 7. Prepare and administer role-playing activities. 8. Give textbook assignment. Correct. 9. Prepare and administer written post-test over discussions, exercises, and/or textbook material. 10. Instruct receptionist to administer the post-test (achievement indicators).	1. Complete questionnaire. 2. Spend time with school's receptionist learning receptioning technique. 3. Read appropriate textbook material and complete textbook assignment. 4. Complete any teacher-made exercise. 5. Participate in role-playing activity. 6. Start notebook on appropriate business dress. 7. Complete post-test.

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 2

Task: Collect information using telephone and/or appropriate forms to insure completion of documents.

Achievement Indicators: The learner:

	Yes	No
1. Gathered appropriate reference information -		
2. Verified phone number -		
3. Dialed proper phone number -		
4. Introduced company, self, purpose of call -		
5. Made inquiries tactfully to obtain desired document information -		
6. Recorded the document information on appropriate form -		
7. Confirmed information to assure mutual understanding -		
8. Expressed appreciation -		
9. Replaced receiver at close of conversation -		

Criteria: Competence in the task will be recognized when the procedure is performed according to requester's requirements and knowledge of proper telephone techniques.

Tools and Equipment:

telephone

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire and discuss.	1. Complete questionnaire.
2. Review and discuss activities from B1.	2. Complete related textbook reading and/or activities.
3. Review and/or discuss the importance of telephone manners.	3. Complete telephone directory exercise.
4. Give related textbook assignment.	4. Complete inquiry exercise.
5. Demonstrate "how to" use a telephone directory to place a call.	5. Participate in role-playing exercise.
6. Prepare, administer, and correct a finding exercise on the telephone directory.	6. Take post-test.
7. Demonstrate the use and purpose of a personal directory. Distribute directories for student use.	
8. Demonstrate the appropriate means to place an inquiring telephone call. Prepare a checklist to accompany presentation.	
9. Demonstrate how to record information on an inquiring form.	
10. Prepare, administer, and correct exercise using prepared conversations on cassette tape in which learner completes a variety of inquiry forms.	
11. Prepare and conduct a role-playing activity on placing telephone inquiries.	
12. Prepare and administer a demonstrating post-test based on achievement indicators.	

Duty: Receiving, Interviewing, and Informing People	**Duty No.** A **Task No.** 3

Task: Answer questions using telephone and proper telephone techniques, verbal communication skills, resource materials, and/or knowledge of the organization to provide information.

Achievement Indicators: The learner:

	Yes	No
1. Answered promptly and pleasantly -		
2. Gave proper identification -		
3. Listened attentively to caller's request -		
4. Volunteered helpful information -		
5. Made inquiries tactfully -		
6. Gave explanations effectively -		
7. Recorded information, if necessary -		
8. Left a pleasing impression at the close of the call -		
9. Made sure that the conversation was completed before replacing the receiver -		

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards and knowledge of proper telephone techniques.

Tools and Equipment:	**Resources:**
Telephone	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire and discuss.	1. Complete questionnaire.
2. Review and discuss telephone manners.	2. Complete related textbook readings and/or activities.
3. Invite or visit the schools' receptionist or telephone operator to discuss how he/she receives phone calls.	3. Participate in case study activity.
4. Visit or have a receptionist from a local company in to discuss how he/she receives telephone calls. Video-tape or take slides for future use.	4. Complete message taking activities.
5. Obtain and show a movie on telephoning. Conduct a discussion.	5. Participate in role-playing activity.
6. Demonstrate how to appropriately answer a telephone call.	6. Participate in receptioning activity with school receptionist.
7. Prepare or use case studies for discussion.	7. Complete post-test.
8. Demonstrate how to record information on telephone record forms. Have student follow along.	
9. Prepare and administer message taking exercise.	
10. Use or prepare role-playing activity on receiving telephone calls.	
11. Have receptionist allow students to receive and handle incoming calls.	
12. Have receptionist administer demonstrating post-test based on achievement indicators.	
13. Prepare and administer objective post-test on materials presented.	

Duty: Receiving, Interviewing, and Informing People

Duty No. A

Task No. 4

Task: Schedule appointments using communication skills and appointment calendar to arrange appointments and meetings.

Achievement Indicators: The learner:

	Yes	No
1. Gathered information concerning appointment:		
a. date -	____	____
b. time -	____	____
c. place -	____	____
d. persons involved -	____	____
e. purpose -	____	____
2. Checked appointment calendar for conflicting appointments -	____	____
3. Made appointment for employer considering:		
a. sufficient time for each appointment -	____	____
b. employer's work habits and preferences -	____	____
4. Reminded employer of appointment -	____	____
5. Marked employer's calendar -	____	____
6. Marked secretary's personal calendar -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards.

Tools and Equipment:

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire and discuss.	1. Complete questionnaire.
2. Discuss key pieces of information to gather to schedule appointments - date, time, place, persons, and purpose.	2. Complete textbook related reading.
3. Demonstrate how and why to use appointment calendar.	3. Participate in group activities.
4. Distribute copies of appointment calendars, employer's calendar and secretary's calendar. Explain and demonstrate their uses and how to use them. Have student follow along.	4. Complete teacher and/or textbook prepared exercise.
5. Invite a secretary to visit class to discuss how he/she schedules and what materials he/she uses.	5. Complete post-test(s).
5. Prepare and/or use textbook prepared exercise on scheduling appointments. Correct and discuss.	
7. Prepare and administer an objective post-test in reading and lectures and/or demonstrating post-test based on achievement indicators.	

Duty: Receiving, Interviewing and Informing People

Duty No. A

Task No. 5

Task: Interview people using communication skills to obtain and/or convey information.

Achievement Indicators: The learner:	Yes	No
1. Greeted visitor courteously -	_____	_____
2. Gave proper identification promptly -	_____	_____
3. Made inquiries to determine the purpose of the visit -	_____	_____
4. Showed interest in the visitor and purpose of the visit -	_____	_____
5. Volunteered helpful information clearly, if appropriate -	_____	_____
6. Recorded information, if necessary -	_____	_____
7. Called additional party, if necessary -	_____	_____
8. Confirmed information to assure mutual understanding -	_____	_____
9. Offered further assistance, if appropriate -	_____	_____
10. Left a pleasing impression at the close of the interview -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire.	1. Complete questionnaire.
2. Visit a local company's receptionist or have him/her visit the school to discuss his/her techniques on how to meet and handle the public. Videotape or take slides and record on tape for future use.	2. Complete textbook reading assignment.
3. Demonstrate how to use a guest registry and message pad.	3. Participate in demonstration.
4. Prepare or use pre-prepared case studies and discuss.	4. Participate in case studies discussion.
5. Prepare or use pre-prepared textbook related exercises.	5. Complete related exercises.
6. Prepare role-playing activities for student.	6. Participate in role-playing activities.
7. Prepare and administer objective post-test based on discussion, reading and exercises and/or demonstrating post-test using role-playing based performance indicators.	7. Complete post-test(s).

Duty: Receiving, Interviewing, and Informing People	**Duty No.** A **Task No.** 6

Task: Question originator using communication skills to determine task requirements of originator.

Achievement Indicators: The learner:

	Yes	No
1. Gathered appropriate reference information -	____	____
2. Contacted originator -	____	____
3. Made inquiries tactfully to obtain desired document information -	____	____
4. Recorded document information on appropriate form -	____	____
5. Confirmed information to assure mutual understanding -	____	____
6. Expressed appreciation -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to knowledge of establishments and professional courtesy.

Tools and Equipment:

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the importance of creating a good impression from B5.	1. Participate in appropriate group activities.
2. Discuss and list when and why a processor would contact an originator or organization on a document.	2. Complete form(s) with instructor.
3. Show, distribute, and demonstrate how to complete documentation forms. Instruct student to complete with you.	3. Participate in role-playing activities.
4. Demonstrate how to properly contact an originator. Review and discuss appropriate techniques.	4. If appropriate, implement process.
5. Design and implement related role-playing activities.	5. Complete post-test(s).
6. If appropriate, implement documentation method in lab.	
7. Prepare and administer post-test (achievement indicators).	

Duty: Receiving, Interviewing, and Informing People	**Duty No.** A **Task No.** 7

Task: Locate workers using verbal or written communication skills to verify workers' attendance on job.

Achievement Indicators: The learner:	Yes	No
1. Reviewed organization's attendance procedures -	____	____
2. Gathered proper supplies and materials -	____	____
3. Identified workers -	____	____
4. Recorded absent employee information -	____	____
5. Submitted attendance document to supervisor -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to set procedures and knowledge of the organization.

Tools and Equipment:	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Invite a local personnel manager to visit and discuss his/her company's attendance policy and procedure and why attendance is important for the employer and employee.	1. Participate in group discussion.
2. Prepare or use pre-prepared case studies on attendance for class activities and discussion.	2. Participate in case studies activity.
3. Gather various companies attendance policies. Distribute and discuss (invite a speaker to discuss with class).	3. Participate in attendance policy and documentation presentation.
4. Gather various companies' attendance documents. Distribute, discuss, demonstrate how to complete (invite a speaker to discuss with class).	4. Complete class activity.
5. Prepare class activity using collected policies and documents.	5. Rotate taking and keeping classroom attendance records.
6. Demonstrate to students how to "keep" classroom attendance records.	6. Complete post-test(s).
7. Prepare and administer objective post-test based on discussions and activities.	

Duty: Performing Telephone Operations	**Duty No.** B
	Task No. 1

Task: Receive call using telephone switchboard to provide information.

Achievement Indicators: The learner:	Yes	No
1. Answered telephone promptly and pleasantly -	____	____
2. Gave proper identification -	____	____
3. Asked for caller's:		
a. name -	____	____
b. company -	____	____
c. party being called -	____	____
d. message if appropriate -	____	____
4. Volunteered helpful information -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and knowledge of switchboard operation.

Tools and Equipment:	**Resources:**
Switchboard System (PBX) - Comkey, Horizon, Dimension, Essex, or Centrex, telephone	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer a "frame of reference" questionnaire to assess a student's background and exposure to a switchboard and telephoning.	1. Complete questionnaire.
2. Review and discuss questionnaire.	2. Observe demonstration and movie.
3. Have a group discussion on what is a switchboard operator and related occupations.	3. Be trained by school's switchboard operator on local switchboard using vendor's operational manual.
4. Visit the school's switchboard operator to discuss his/her job and how he/she operates the switchboard.	4. Participate in role-playing activity.
5. Obtain and show a movie on telephone manners and procedures from your telephone company or media center.	5. Complete related textbook assignments.
6. Prepare and use a discussion sheet on the film.	6. Discuss information presented.
7. Demonstrate "how to" answer the telephone properly. Include the following: a. identifying yourself b. identifying the caller c. miscellaneous answering techniques.	7. Read and discuss telephone booklet.
8. Discuss the importance of the following telephone manners: a. voice b. speed c. vocabulary d. courtesy	8. Take post-test.

Duty: Performing Telephone Operations	**Duty No.** B **Task No.** 2

Task: Route calls using telephone switchboard to connect caller with appropriate party.

Achievement Indicators: The learner:	Yes	No
1. Answered promptly and pleasantly -	____	____
2. Gave proper identification -	____	____
3. Asked for caller's		
a. name -	____	____
b. company -	____	____
c. party being called -	____	____
4. Used proper techniques to leave the line -	____	____
5. Selected proper extension/trunk line -	____	____
6. Transferred call:		
a. allowed sufficient ringing time -	____	____
b. notified party on extension number of incoming call -	____	____
c. returned to call if party did not answer -	____	____
d. took message, if necessary -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and knowledge of switchboard operations.

Tools and Equipment:	**Resources:**
Switchboard System (PBX) - Comkey, Horizon, Dimension, Essex, or Centrex; Telephone	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss or review the following activities from C1 in terms of routing calls: a. switchboard visit and observation b. film c. appropriate telephone manners d. reading materials e. switchboard operation 2. Review and discuss post-test from C1. 3. Have a group discussion on routing calls and taking messages. 4. Demonstrate how to use an inhouse directory. 5. Prepare, administer, and review an exercise related to using the directory. 6. Demonstrate how to take various telephone messages. 7. Prepare, administer, and review an exercise related to message taking. 8. Have the switchboard operator demonstrate how to route calls and take messages and discuss. 9. Have switchboard operator administer post-test.	1. Observe demonstration. 2. Complete directory exercise. 3. Complete message-taking exercise. 4. Complete related textbook assignments. 5. Be trained by school's switchboard operator using the switchboard on how to route calls and take messages. 6. Take post-test.

Duty: Performing Telephone Operations

Duty No. B

Task No. 3

Task: Place call using telephone switchboard to connect caller with appropriate party.

Achievement Indicators: The learner:

	Yes	No
1. Secured the telephone number -	____	____
2. Dialed the number -	____	____
3. Spoke distinctly and courteously -	____	____
4. Gave identification of caller -	____	____
5. Transferred call to caller, if applicable -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and knowledge of switchboard operations.

Tools and Equipment:
Switchboard System (PBX) - Comkey, Horizon, Dimension, Essex, or Centrex; telephone

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss for review the following activities from C1 and C2: a. overall switchboard operation to date b. telephone manners c. message taking 2. Review and discuss post-test from C2. 3. Have a group discussion on placing a call. 4. Demonstrate how to locate phone numbers in loca, in-state, and out-of-state telephone directories. 5. Prepare, administer, and review an exercise from the directories available. 6. Demonstrate on the telephone how to dial local and long-distance phone calls. 7. Observe and evaluate student's dialing demonstration. 8. Request school's switchboard operator to demonstrate how to place local and long-distance calls on the switchboard. Discuss. 9. Have switchboard operator administer post-test.	1. Observe demonstration. 2. Complete telephone directory exercise. 3. Demonstrate how to appropriately dial numbers from directory exercise on disconnected telephone. 4. Be trained by school's switchboard operator on how to place local and long-distance calls. 5. Take post-test.

Duty: Performing Telephone Operations

Duty No. B

Task No. 4

Task: Page establishment personnel using the paging system to call individuals to phone.

Achievement Indicators: The learner:

	Yes	No
1. Determined individual to be paged -		
2. Manipulated keys, levers, switches to activate paging device -		
3. Spoke clearly and distinctly into paging microphone -		
4. Repeated message -		

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and knowledge of paging system operation.

Tools and Equipment:
public address system (PA system

Resources:

Teacher Activities	Student Learning Activities
1. Prepare and administer a "frame of reference" questionnaire to assess a student's background and exposure to a PA system.	1. Complete questionnaire.
2. Review and discuss questionnaire.	2. Observe demonstration.
3. Have a group discussion on what a PA system is used for.	3. Be trained by school personnel/switchboard operator on PA system's operation and use.
4. Request school personnel/switchboard operator to demonstrate to students how to operate and use PA system and discuss.	4. Take post-test.
5. Have school personnel/switchboard operator administer post-test.	

Duty: Preparing and Distributing Mail	**Duty No.** C	**Task No.** 1

Task: Process mail and documents using manual techniques to prepare mail for distribution to proper location or files.

Achievement Indicators: The learner:

	Yes	No
1. Gathered incoming mail and documents -	____	____
2. Arranged mail/documents according to addressee or department -	____	____
3. Opened and removed contents -	____	____
4. Recorded incoming mail on the mail register -	____	____
5. Dated incoming mail with proper notation or stamp -	____	____

Criteria: Competence will be recognized when the task is performed according to established procedures.

Tools and Equipment:	**Resources:**
several examples of mail (10); mail register; company personnel list; exercise directions; letter opener	See Bibliography.

Teacher Activities	Student Learning Activities
1. Assemble materials needed to complete exercises to be assigned.	1. Read assigned material.
2. Alert students to the use of mail systems for companies large and small.	2. Participate in class demonstration simulation.
3. Show students that future usage may involve mechanical equipment through the use of pictures prepared by instructor.	3. Sort mail according to directions given in handout.
4. Assign reading assignments from resources available.	4. Record incoming mail on register.
5. Use two pieces of mail to show the proper procedures to the group with each student having a copy in hand.	5. Make proper notation or stamp incoming item.
6. Distribute exercise directions.	6. Distribute mail from the exercises to areas designated by your instructor.
7. Distribute materials needed to complete the exercise.	
8. Instruct students to give step by step description while another follows the directions.	

Duty: Preparing and Distributing Mail	**Duty No.** C **Task No.** 2

Task: Route mail and documents to the proper location using an organizational directory or reference materials.

Achievement Indicators: The learner:

	Yes	No
1. Gathered incoming mail which had been opened and sorted -	____	____
2. Delivered sorted mail to the proper department or individual using the organizational directory or reference material -	____	____
3. Attached routing slip or envelope for delivery to other departments -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:	**Resources:**
sorted mail items; organization chart; reference materials; routing slips; courier envelopes	See Bibliography.

Teacher Activities	Student Learning Activities
1. Demonstrate a company mail envelope for routing.	1. Participate in class discussion and demonstration.
2. Distribute exercise directions and reference material.	2. Read assigned text material or reference material.
3. Distribute material needed to complete the task.	3. Obtain exercise handouts, materials and directions.
	4. Prepare routing slips or envelopes for the designated items.
	5. Deliver items to appropriate location according to task directions.

Duty: Preparing and Distributing Mail	**Duty No.** C **Task No.** 3

Task: Collect mail and documents to address and stuff for processing and/or delivery.

Achievement Indicators: The learner:

	Yes	No
1. Gathered outgoing documents -	____	____
2. Inspected outgoing documents to determine attachments or enclosures -	____	____
3. Selected proper attachments or enclosures to coordinate with outgoing documents -	____	____
4. Inserted folded outgoing mail in envelopes properly -	____	____
5. Addressed envelopes or labels properly -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures and originators instructions.

Tools and Equipment:	**Resources:**
envelopes; labels; mail items; enclosure items	See Bibliography.

Teacher Activities	Student Learning Activities
1. Demonstrate proper folding procedures for No. 10 envelopes (this size is used most in business).	1. View demonstration on folding techniques and proper way to insert items in a No. 10 envelope.
2. Show students how to scan letter for proper enclosures.	2. Read material in assigned text.
3. Demonstrate proper insertion of items for No. 10 envelope.	3. Complete exercise according to directions of instructor.
4. Give several ways an envelope can be sealed: a. If one or two items - done by learner. b. Several items - special applicator with sponge.	4. Prepare items for outgoing mail.
5. Assign reading when available or prepare a student handout.	
6. Prepare several items to be processed.	

Duty: Preparing and Distributing Mail

Duty No. C

Task No. 4

Task: Apply postage using manual techniques to prepare mail for delivery.

Achievement Indicators: The learner:

	Yes	No
1. Gathered stuffed, sealed, outgoing mail -	____	____
2. Selected correct postage and class per outgoing mail using a postage scale -	____	____
3. Affixed postage securely to envelope -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed standards and postal regulations.

Tools and Equipment:	**Resources:**
current postage rates; postage scale; mail items; postage stamps	See Bibliography.

Teacher Activities	Student Learning Activities
1. Obtain postal regulations for mailing procedures.	1. View demonstration of postal scales.
2. Use prepared envelopes and documents from previous tasks.	2. Read postal regulations selected by instructor.
3. Review the importance of properly labeling outgoing mail.	3. Retrieve previous mail items.
4. Demonstrate use of postage scales.	4. Using handout, affix proper postage to outgoing mail.
5. Discuss postal regulations.	5. Return to instructor for evaluation.
6. Assign any reading material necessary.	
7. Instruct students to complete outgoing procedures.	
8. Evaluate student projects according to achievement indicators.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D
	Task No. 1

Task: Receive cash and checks using knowledge of monetary denominations to accept as a deposit on a customer's account or as a payment on a customer's bill.

Achievement Indicators: The learner:	Yes	No
1. Verified numeric data -- separated and counted dollars and coins -	_____	_____
2. Verified check data -- date, amount, and signature -	_____	_____
3. Recorded data to appropriate account -	_____	_____
4. Calculated and recorded new balance -	_____	_____
5. Prepared receipt, if appropriate -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
customer account record; electronic calculator; receipt book	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test based on achievement indicators.	1. Take pre-test.
2. Discuss pre-test results.	2. Participate in field trip and prepare a written report describing the visitation.
3. Give oral presentation on receiving cash and/or checks for payment on account.	3. Participate in group exercise on handling cash payments.
4. Visit a local bank and/or company credit department to observe monetary functions. Take slides for future use.	4. Complete individual exercise for receiving cash.
5. Prepare handout and group exercise on handling cash and checks, recording payments, and preparing receipts.	5. Complete textbook related assignment.
6. Prepare and administer individual exercise(s) on receiving cash and checks.	6. Complete a post-test.
7. Prepare and administer post-test based on achievement indicators.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 2

Task: Cash checks using knowledge of monetary denominations and negotiable instruments to exchange for cash.

Achievement Indicators: The learner:	Yes	No
1. Gathered checks to be cashed -	____	____
2. Endorsed checks -	____	____
3. Cashed check, i.e., bank, store, etc. -	____	____
4. Verified money received for accuracy -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Administer the pre-test over the achievement indicators.	1. Complete a pre-test.
2. Discuss the results of the pre-test.	2. Complete endorsement exercises.
3. Demonstrate the appropriate ways to endorse checks.	3. Participate in small group exercise on cashing and receiving checks.
4. Prepare, administer, and correct exercise on check endorsements.	4. Complete textbook assignments.
5. Prepare small group exercise on cashing checks and receiving cash.	5. Complete a post-test.
6. Assign and correct textbook related assignment.	
7. Prepare and administer objective post-test related to achievement indicators.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 3

Task: Deposit cash and checks using appropriate forms and written or verbal communication skills to entrust employer's money to bank for safe-keeping.

Achievement Indicators: The learner:

	Yes	No
1. Separated checks from cash -		
2. Checked employer's endorsement/stamp -		
3. Counted currency and coins -		
4. Entered checks or deposit slip by bank number -		
5. Entered amount of cash or deposit slip -		
6. Totaled deposit slip -		
7. Made deposit -		

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:
prepared checks; cash or cash figure; deposit slip; rubber stamp

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Administer pre-test based on achievement indicators.	1. Take a pre-test.
2. Discuss results of the pre-test.	2. Participate in role-playing activity.
3. Give demonstration, presentation and handout showing proper way to fill out a deposit slip.	3. Complete simulations assigned.
4. Prepare and administer role-playing activity on making deposits.	4. Complete post-test.
5. Prepare and administer textbook related assignment.	
6. Prepare and administer simulated activity.	
7. Prepare and administer objective post-test related to achievement indicators.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 4

Task: Sell money orders, traveler's checks, and savings bonds using written and verbal communication skills and appropriate forms to provide service to customers.

Achievement Indicators: N/A

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
Blank money orders; traveler's checks; savings bonds	See Bibliography.

Teacher Activities	Student Learning Activities
1. Administer a pre-test using a teacher created role-plyaing activity.	1. Participate in role-playing activity.
2. Discuss the pre-test activity.	2. Attend visitation and prepare report over visit.
3. Give oral presentation and discussion on methods of handling customers.	3. Complete textbook assignment(s).
4. Visit a local bank/credit union to observe selling of negotiable items. Take slides for future use.	4. Complete simulated exercise.
5. Discuss the process of selling negotiable items. List procedures.	5. Complete post-test.
6. Give and administer textbook related assignment(s).	
7. Prepare and administer simulated exercise.	
8. Prepare and administer objective post-test based on #5 procedures.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 5

Task: Prepare payroll using time sheets and record of payrate to provide pay to employees.

Achievement Indicators: The learner:	Yes	No
1. Gathered time sheets and appropriate forms -	____	____
2. Totaled time sheets -	____	____
3. Computed gross wages per employee -	____	____
4. Computed employee deductions -	____	____
a. FICA b. income tax c. other taxes d. other deductions		
5. Computed net wages per employee -	____	____
6. Recorded all information on appropriate payroll form -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
time sheets; tax tables; payroll register; electronic calculator	See Bibliography.

Teacher Activities	Student Learning Activities
1. Administer pre-test based on achievement indicators. 2. Discuss results of pre-test. 3. Administer math pre-test. 4. Discuss results of math pre-test. 5. Give oral presentation on the importance of keeping accurate and confidential records. 6. Invite a payroll clerk to visit class and discuss his/her job and skill needs. Video-tape it for future use. 7. Demonstrate how to complete and compute timesheets including wages and deductions. Have students participate. 8. Demonstrate how to prepare additional payroll forms related to time sheets. Have students participate. 9. Assign and administer textbook related assignment. 10. Prepare and administer post-test based on achievement indicators.	1. Complete pre-tests. 2. Participate in class presentations. 3. Complete textbook related assignments. 4. Complete post-test.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 6

Task: Open accounts using written and verbal communications skills and appropriate forms to provide service to customers.

Achievement indicators: N/A

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
customer account forms	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire over opening an account and discuss.	1. Complete and discuss questionnaire.
2. Invite local banker to visit class to discuss and demonstrate how to open an account. Video-tape for future use.	2. Participate in group activity to open an account.
3. Prepare and administer group activity on opening an account.	3. Complete textbook related assignment.
4. Assign and administer textbook related assignments.	4. Complete post-test.
5. Prepare and administer post-test related to group activities and textbook assignment.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 7

Task: Issue statement using appropriate forms and handwritten techniques or keyboard equipment to report amount due from customer.

Achievement Indicators: The learner:

	Yes	No
1. Separated invoices by customer -	_____	_____
2. Prepared heading for customer statement -	_____	_____
3. Recorded date, number of invoice, and invoice amount -	_____	_____
4. Recorded payments received -	_____	_____
5. Totaled statement -	_____	_____
6. Distributed copies to appropriate destinations/ individuals -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
electronic calculator	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test over the achievement indicators.	1. Complete pre-test.
2. Discuss results of pre-test.	2. Participate in group activity on invoicing.
3. Give oral presentation on the necessity of invoicing customers.	3. Complete texrbook related assignments.
4. Demonstrate in group activity how to prepare an invoice.	4. Complete post-test.
5. Distribute sample of completed invoices.	
6. Assign and administer textbook related assignments.	
7. Prepare and administer post-test based on achievement indicators and student activities.	

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire and discuss.	1. Complete questionnaire and participate in discussion.
2. Visit a local business to see how customer accounts are restricted. Take slides for future use.	2. Participate in and write summary on guest spaker and/or field trip.
3. Invite local credit clerk to visit class and discuss procedures for restricting accounts.	3. Complete exercises and assignments.
4. Give demonstration presentation on how to "flag" customer accounts using handwritting, a rubber stamp, and keyboard equipment.	4. Complete post-test.
5. Prepare and administer simulated exercise on flagging.	
6. Assign textbook related assignment	
7. Prepare and administer objective post-test based on presentations and exercises.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 8

Task: Restrict customer's usage of account using handwritten techniques, keyboard equipment, or rubber stamps to retrieve uncollected funds from customer.

Achievement Indicators:

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
rubber stamp; keyboard equipment	See Bibliography.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 9

Task: Compute data using knowledge of business math operations and appropriate rate books to determine gross earnings, deductions, and net earnings.

Achievement Indicators: The learner:	Yes	No
1. Gathered proper supplies and reference books -		
2. Verified the numerical data on the timesheets -		
3. Determined appropriate calculations to be performed to compute gross earnings, deductions, and net earnings -		
4. Performed determined calculations to compute gross earnings, deductions, and net earnings -		
5. Verified calculations -		
6. Recorded calculations in a payroll journal -		
7. Submitted payroll journal -		

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:
payroll journal

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Inquire whether students are employed. Instruct employed students to bring in a check stub.	1. Take pre-test.
2. Prepare and administer pre-test on achievement indicators.	2. Read assigned material from textbook of instructor's choice.
3. Discuss results of pre-test.	3. Complete a simulated payroll prepared by the instructor in which they will: (a) compute gross earnings; (b) use tables to find deductions; and (c) compute net earnings.
4. Tell students that if gross earnings, deductions, and net earnings are computed accurately, employees will receive the accurate amount due at the end of a payroll period. Accurate recording of information will simplify the task of subsequent verification.	4. Record the simulated payroll on a payroll journal and submit.
5. Visit an office of an employee who has the primary responsibility of computing payroll. Take slides for future use.	5. Verify another student's payroll journal for accuracy by using checklist on the overhead.
6. Invite a speaker who handles payroll on a regular basis to speak to the class.	6. Take a post-test.
7. Explain to the students the formulas used to compute gross earnings and net earnings.	
8. Explain and demonstrate to the students proper usage of the Federal, State and FICA tables.	
9. Administer post-test on achievement indicators.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 10

Task: Compute data using knowledge of business math operations and appropriate rate books to determine commissions.

Achievement Indicators: The learner:

	Yes	No
1. Gathered proper supplies and reference books -		
2. Verified the numerical data on the timesheets -		
3. Determined appropriate calculations to be performed to compute commission, gross earnings, deducations and net earnings -		
4. Performed determined calculations to compute commission, gross earnings, deductions, and net earnings -		
5. Verified calculations -		
6. Recorded calculations in a payroll journal -		
7. Submitted payroll journal -		

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:
payroll journal

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Inquire whether students have been involved in money making projects and discuss. 2. Prepare and administer pre-test on achievement indicators. 3. Discuss results of pre-test. 4. Tell students when commission, gross earnings, deductions, and net earnings are computed accurately, employees will receive the accurate amount due at the end of a payroll period. Accurate recording of information will simplify the task of subsequent verification. 5. Visit an office of an employee who has the primary responsibility of computing payroll. Take slides for future use. 6. Invite a speaker who handles payroll on a regular basis to speak to the class. 7. Explain to the students the various plans that can be offered to an employee working on a commission basis. 8. Explain to the students the formulas used to compute gross earnings and net earnings. 9. Explain and demonstrate to the students proper usage of the Federal, State, and FICA tables. 10. Explain that it is important for the students to know various methods which employers use to compensate employees. 11. Administer post-test on achievement indicators.	1. Take pre-test. 2. Read assigned material from textbook of instructor's choice. 3. Complete a simulated payroll prepared by the instructor in which they will: (a) compute gross earnings; (b) use tables to find deductions; and (c) compute net earnings. 4. Record the simulated payroll on a payroll journal and submit. 5. Verify another student's payroll journal for accuracy. 6. Take a post-test.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 11

Task: Compute data using knowledge of business math operations and appropriate rate books to determine discounts, payments, credits and debits.

Achievement Indicators: The learner:	Yes	No
1. Gathered proper supplies and reference books -		
2. Verified the numerical data on the sales slip -		
3. Determined appropriate calculations to be performed to compute discount and total payment amount -		
4. Performed determined calculations to compute discount and total payment amount -		
5. Verified calculations -		
6. Posted the credits and debits to the customer's account record -		
7. Verified posted amounts -		
8. Submitted customer's account record for approval -		

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:
customer accounts receivable ledger

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Inquire whether students have made any purchases on time payments. 2. Prepare and administer pre-test on achievement indicators. 3. Discuss results of pre-test. 4. Explain to students that if they compute the customer's discount to correctly verify the customer's payment, their customer will feel confident that his/her accounts receivable ledger is accurate and up to date. Accuracy is vital for subsequent verification on customer request and the adherence to federal and state imposed requirements for sales and income tax purposes. 5. Visit an office of an employee who has the primary responsibility of computing customer discounts and posting to customer accounts. Take slides for future use. 6. Invite a speaker who handles customer accounts on a regular basis to speak to the class. 7. Explain to the students the various discounts that can be offered to a customer. 8. Explain to the students the formulas used to compute a discount and total payment. 9. Explan to the students how to use a sales tax table. 10. Explain to the students how to post a debit and credit to the customer accounts receivable ledger. 11. Explain the importance of computing the correct discount and payment of a customer's invoice is to ensure that they can maintain credibility with the company's customers and keep their accounts up to date. 12. Administer post-test.	1. Take pre-test. 2. Read assigned material from textbook of instructor's choice. 3. Complete one of the following: a. pair up with another student and role-play a customer/clerk simulation problem. Each student will reverse roles to gain experience in each role. Upon completion complete a teacher-made check sheet on the simulation which will include: (1) how clerk handled customer (2) did clerk compute sales invoice accurately? (3) did customer verify the sales invoice? (4) did customer make proper payment? (5) did clerk show proof of payment? b. complete simulated problem of a sales invoice and record to a customer's accounts receivable ledger. 4. Take a post-test.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 12

Task: Compute data using knowledge of business math operations and appropriate rate books to determine interest rates.

Achievement Indicators: The learner:	Yes	No
1. Gathered proper supplies and reference books -	_____	_____
2. Verified the numerical data on the customer/company account record -	_____	_____
3. Determined appropriate calculations to compute interest rate on the customer account -	_____	_____
4. Performed determined calculations to compute interest rate on the customer/company account -	_____	_____
5. Verified calculations -	_____	_____
6. Submitted customer/company account record for approval -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:	**Resources:**
pen or pencil; customer account form; customer savings book/checkbook	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test on achievement indicators.	1. Take a pre-test.
2. Discuss results of pre-test.	2. Read assigned material from textbook of instructor's choice.
3. Explain to students that if they compute the interest on a customer's account accurately, they can gain the customer's credibility and save him/her money in further interest charges.	3. Complete one or more of the following activities: a. complete a simulated problem of a posting of a customer's charge account and post debits, credits, and compute interest due for past three months. b. verify a company's savings account for a quarter by computing the interest earned. c. verify a company's checking account for a month by computing the interest earned.
4. Explain to students that if they can compute the interest rate on their company's saving/checking account, they can verify end-of-the-month statements from the bank.	4. Take a post-test.
5. Visit a local bank to enable the student to explore the teller occupation.	
6. Invite a speaker from a local bank to visit your class to explain how to calculate interest rates and what the earned interest is used for.	
7. Explain to the students the formula for computing interest.	
8. Explain to the students how to use an interest rate table.	
9. Explain to the students how to post an interest amount to a customer account.	
10. Explain to the student how to verify monthly bank company accounts.	
11. Tell the students the importance of computing the interest rate accurately is to enable the employee to compute the interest due on a charge customer account or to verify the interest earned on a company saving/checking account.	
12. Administer post-test on achievement indicators.	

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 13

Task: Calculate data using adding machine or calculator to determine gross earnings, deductions, and net earnings.

Achievement Indicators: The learner:	Yes	No
1. Gathered proper supplies and reference books -		
2. Verified the numerical data on the timesheets -		
3. Determined appropriate calculations to be performed to compute gross earnings, deductions, and net earnings -		
4. Performed calculations on the adding machine or calculator -		
5. Verified calculations -		
6. Recorded calculations in a payroll journal -		
7. Submitted payroll journal -		

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:	**Resources:**
payroll journal; adding machine/calculator; check protector; pegboard payroll simulation practice set	See Bibliography.

Teacher Activities

1. Prepare and administer pre-test on achievement indicators.
2. Discuss results of pre-test.
3. Explain to students that if they compute gross earnings, deductions, and net earnings accurately, employees will receive the accurate amount due at the end of a payroll period. Accurate recording of information will simplify the task of later verification. To simplify the task, the student will utilize an adding machine or calculator.
4. Visit an office of an employee who has the primary responsibility of computing payroll with the assistance of an adding machine or calculator.
5. Invite a speaker who handles payroll on a regular basis to speak to the class.
6. Explain to the students the formulas used to compute gross earnings and net earnings.
7. Demonstrate to the students the 10-key-touch method of operating the adding machine or calculator.
8. Explain/demonstrate to students proper usage of the Federal, State and FICA tables.
9. Explain to the students that the importance of computing gross earnings, deductions, and net earnings is for satisfied employee relations and to meet state and federal imposed requirements for their company. By utilizing an adding machine or calculator, it makes their job easier and more accurate.
10. Administer post-test on achievement indicators.

Student Learning Activities

1. Take a pre-test.
2. Read assigned material from textbook of instructor's choice.
3. Complete one of the following:
    a. complete a simulated payroll prepared by the instructor in which you will:

        (1) compute gross earnings
        (2) use tables to find deductions
        (3) compute net earnings

        Verify another student's payroll journal for accuracy.

    b. Complete a pegboard payroll practice simulation and submit at assigned intervals for checking.
4. Take a post-test.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions

Duty No. D

Task No. 14

Task: Calculate data using adding machine or calculator to determine commissions.

Achievement Indicators: The learner:

	Yes	No
1. Gathered proper supplies and reference books -	____	____
2. Verified the numerical data on the time sheets -	____	____
3. Determined appropriate calculations to be performed to compute commission, gross earnings, deductions, and net earnings -	____	____
4. Performed calculations on the adding machine or calculator -	____	____
5. Verified calculations -	____	____
6. Recorded calculations in a payroll journal -	____	____
7. Submitted payroll journal -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:
payroll journal; adding machine/calculator

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test on achievement indicators. 2. Discuss results of pre-test. 3. Explain to students that if they compute commission, gross earnings, deductions, and net earnings accurately, employees will receive the accurate amount due at the end of a payroll period. Accurate recording of information will simplify the task of subsequent verification. To simplify the task, the student will utilize an adding machine or calculator. 4. Visit an office of an employee who has the primary responsibility of computing payroll. 5. Invite a speaker who handles payroll on a regular basis to speak to the class. 6. Explain to the students the various plans that can be offered to an employee working on a commission basis. 7. Explain to the students the formulas used to compute gross earnings and net earnings. 8. Demonstrate to the students the 10-key-douch method of operating the adding machine or calculator. 9. Explain/demonstrate to students proper usage of the Federal, State and FICA tables. 10. Explain that it is important for the student to know various methods which employers use to compensate employees. By utilizing an adding machine or calculator, it makes their job easier and more accurate. 11. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material from textbook of instructor's choice. 3. Complete a simulated payroll prepared by the instructor in which you will: a. compute gross earnings b. use tables to find deductions c. compute net earnings 4. Record the simulated payroll on a payroll journal and submit. 5. Verify another student's payroll journal for accuracy. 6. Take a post-test.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 15

Task: Calculate data using adding machine or calculator to determine discounts, payments, credits, and debits.

Achievement Indicators: The learner:	Yes	No
1. Gathered proper supplies and reference books -	____	____
2. Verified the numerical data on the sales slip -	____	____
3. Determined appropriate calculations to be performed to compute discount and total payment amount -	____	____
4. Performed calculations on the adding machine or calculator -	____	____
5. Verified calculations -	____	____
6. Posted the credits and debits to the customer's account record -	____	____
7. Verified posted amounts -	____	____
8. Submitted customer's account record for approval -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:	**Resources:**
customer accounts receivable ledger; adding machine/ calculator	See Bibliography.

Teacher Activities

1. Prepare and administer pre-test on achievement indicators.
2. Discuss results of pre-test.
3. Explain to students that if they compute the customer's discount to correctly verify the customer's payment, their customer will feel confident that his/her accounts receivable ledger is accurate and up-to-date. Accuracy is vital for later verification on customer request and to meet federal and state imposed requirements for sales and income tax purposes.
4. To simplify the task the student will utilize an adding machine or calculator.
5. Invite a speaker who handles customer accounts on a regular basis to speak to the class.
6. Explain to the students the various discounts that can be offered to a customer.
7. Explain to the students the formulas used to compute a discount and total payment.
8. Demonstrate to the students the 10-key-touch method of operating the adding machine or calculator.
9. Explain/demonstrate to students how to use a sales tax table.
10. Explain/demonstrate to students how to post a debit and credit to customer accounts receivable ledger.
11. Explain to the student that the importance of computing the correct discount and payment of a customer's invoice is so that they can maintain credibility with the company's customer and keep their accounts up-to-date. By utilizing an adding machine or calculator, it makes their job easier and more accurate.
12. Administer post-test on achievement indicators.

Student Learning Activities

1. Take a pre-test.
2. Read assigned material from textbook of instructor's choice.
3. Complete one or more of the following activities:
    a. pair up with another student and role-play a customer/clerk simulation problem. Reverse roles to gain experience in each role. Upon complete complete a teacher-made check sheet on the simulation which will include:
        (1) how did clerk handle customer?
        (2) did clerk compute sales invoice accurately?
        (3) did customer verify the sales invoice?
        (4) did customer make proper payment?
        (5) did clerk show proof of payment?
    b. complete simulated problem of a sales invoice and record to a customer's accounts receivable ledger.
4. Take a post-test.

Duty: Performing Accounting, Banking, Credit, and Payroll Functions	**Duty No.** D **Task No.** 16

Task: Calculate data using adding machine or calculator to determine interest rates.

Achievement Indicators: The learner:

	Yes	No
1. Gathered proper supplies and reference books -	____	____
2. Verified the numerical data on the customer/company account record -	____	____
3. Determined appropriate calculations to compute interest rate on the customer account -	____	____
4. Performed calculations on the adding machine or calculator -	____	____
5. Verified calculations -	____	____
6. Submitted customer/company account record for approval -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to reference tables and prescribed formulas.

Tools and Equipment:	**Resources:**
customer account form; adding machine or calculator; customer savings book/checkbook	See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test on achievement indicators.	1. Take a pre-test.
2. Discuss results of pre-test.	2. Read assigned material from textbook of instructor's choice.
3. Explain to students that if they can compute the interest on a customer's account accurately, they can gain the customer's creditbility and save him/her money in further interest charges.	3. Complete one or more of the following activities: a. complete a simulated problem of a posting of a customer's charge account and post debits, credits, and compute interest due for poast three months.
4. Explain to students that if they can compute the interest rate on their company's saving/checking account, they can verify end-of-tne-month statements from the banks.	b. verify a company's savings account for a month by computing the interest earned.
5. To simplify the task, the student will utilize an adding machine or calculator.	4. Take a post-test.
6. Invite a speaker from a local bank to visit your class to explain how to calculate interest rates and what the earned interest is used for.	
7. Explain to the students the formula for computing interest.	
8. Demonstrate to the students the 10-key-touch method of operating the adding machine or calculator.	
9. Explain/demonstrate to students how to use an interest rate table.	
10. Explain/demonstrate to students how to post an interest amount to a customer's account.	
11. Explain/demonstrate to students how to verify monthly bank company accounts.	
12. Explain to the students that the importance of computing the interest rate accurately is to enable the employee to compute the interest due on a charge customer account or to verify the interest earned on a company saving/checking account. By utilizing an adding machine or calculator, it makes their job easier and more accurate.	
13. Administer post-test on achievement indicators.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 1

Task: Format information using forms to prepare letters, labels, documents, forms, or statistical reports.

Achievement Indicators:

The learner:	Yes	No
1. Selected the appropriate form (purchase order, memo, invoice, letterhead, etc.) -	____	____
2. Inserted the form into typing device -	____	____
3. Selected format to be used to produce the document -	____	____
4. Set the proper format on the typing device -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines, independent judgment, and/or knowledge of technical keyboard techniques.

Tools and Equipment:

typewriter and/or word processor; letterhead; purchase orders; invoices; memos

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer a pre-test which covers the theory related to each of the formats listed in the task.	1. Read formatting procedures for each type of information in typewriting text of instructor's choice or in word processor operating guide.
2. Explain why this is an important task and restate the task which is being taught.	2. Practice the material in the operator's guide or typewriting textbook.
3. Explain to students that they must know when to use the various forms so they can make correction decisions as problems are given to them.	3. Complete supplemental problems using each type of information (letters, labels, documents, forms, or statistical reports).
4. Show the proper format for each of the documents.	4. Complete a series of problems (an in-basket or short simulation) where the proper format must be chosen.
5. Show the students the needed sections in the operator's manual for formatting each document.	
6. Discuss the functions of each document so the student will know when to use each format.	
7. Be available to answer questions as the work is being completed.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 2

Task: Type information using typing equipment and appropriate forms to prepare letters, labels, documents, forms, or statistical reports.

Achievement Indicators: The learner:	Yes	No
1. Typed the document (letters, memo, label, forms, statistical report, etc.) -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the operator's instructions as established by the employers guidelines and/or operator's manual, and knowledge of typing procedures.

Tools and Equipment:	**Resources:**
available typewriting equipment	See Bibliography.

Teacher Activities	Student Learning Activities
1. Administer pre-tests on letters, labels, documents, forms and statistical reports. The student should already know how to format these items.	1. Read assigned problems.
2. Explain why this is an important task and restate the task which is being taught.	2. Use the dictionary or other reference sources as needed.
3. Review proper format of each piece of information, if necessary.	3. Select the format to be used and type the assigned problems in the proper format.
4. Review the different forms (purchase order, invoice, requisition, etc.) to be sure students understand the use of each.	4. Proofread all material before submitting completed work.
5. Discuss criteria for usable work.	5. Any material which is not satisfactory should be retyped and/or corrected.
6. Provide reference sources for students.	
7. Provide a variety of exercises -- handwritten copy, rough draft, etc.	
8. Be available to answer any questions as items are being completed.	
9. Administer a post-test which could be an in-basket or short simulation utilizing the various types of infomration.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 3

Task: Take dictation using shorthand, speedwriting or stenotype techniques and appropriate equipment to prepare typewritten documents.

Achievement Indicators: The learner:

	Yes	No
1. Assembled necessary supplies for dictation -	____	____
2. Recorded dictation -	____	____
3. Assembled necessary supplies for transcription -	____	____
4. Read over documents to be transcribed:		
a. inserted proper punctuation -	____	____
b. selected proper document format -	____	____
c. selected proper document paper supplies -	____	____
d. used dictionary or other reference material as needed -	____	____
5. Typed documents -	____	____
6. Proofread documents -	____	____
7. Corrected all errors -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to originator's specifications and knowledge of dictating procedures.

Tools and Equipment: typewriter; shorthand pad	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Give a pre-test.	1. Do proofreading exercises of transcripts.
2. Give one-minute and/or three-minute dictations at 60, 70, 80, 90, 100, 120, 140, 160, and 200.	2. Secure spelling lists to study for quiz.
3. Have students read back from their notes and choose the take(s) to transcribe in mailable form or with 95 percent accuracy.	3. Incorporate these lists into daily use.
4. Observe the students writing: no longhand, correct posture, consistently moving pen, crossout for mistakes, theory, brief forms, abbreviations, one side of pad, page flipping.	4. Take dictation from teacher to transcribe; either timed and/or office style.
5. Show slide, film, pictures or posters of correct way to take dictation.	5. Take dictation from tapes, records.
6. Demonstrate reading through notes for punctuation and grammatical corrections or additions.	6. Complete exercises on reference material use.
7. Demonstrate methods of erasing (backspacing: Selectric II Correctable, window envelope, pencil stick eraser, eraser tape).	7. Do communication exercises: capitalization, punctuation, spelling, antonyms, synonyms, homonyms.
8. Demonstrate squeezing and spreading.	8. Do games to review brief forms, states, abbreviated words, phrases.
9. Invite school secretary or business secretary to show and tell.	
10. Administer post-test to correlate with the pre-test.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 4

Task: Transcribe materials using mechanical equipment to prepare documents.

Achievement Indicators: The learner:	Yes	No
1. Set up supplies and equipment -	____	____
2. Listened to instructions and corrections before typing -	____	____
3. Determined appropriate document length -	____	____
4. Selected proper document format -	____	____
5. Typed in appropriate format -	____	____
6. Proofread document -	____	____
7. Corrected all errors -	____	____
8. Submitted document to originator -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to transcribing procedures and the originator's specifications.

Tools and Equipment:	**Resources:**
transcribing unit; pre-recorded media; program diskette/student diskette	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with the students correct format and format changes needed; including left and right margins, top and bottom margins, tabs, paper size, 10/12 pitch, single and double spacing, justified margins.	1. Read assigned material in the reference manual.
2. Discuss any questions the students may have.	2. Observe demonstration on changing the format (margins, tabs, paper size, pitch, spacing, justified margins).
3. Show the learner the needed sections in the reference guide for format changes and printing out documents.	3. Listen to instructions and corrections before typings.
4. Discuss briefly the functions to be used in transcribing materials using mechanical equipment.	4. Manipulate the keyboard and function keys to produce the document.
5. Be available to answer any questions as the document is being produced.	5. Proofread the document before printing out, correct errors as necessary.
6. Show posters of similar finished documents explaining format changes.	6. Submit the completed document to the instructor and then to the originator.
7. Check transcribed document for errors and proper format for mailable form.	7. Make any corrections needed on the recalled document and print out again.
8. Have originating personnel complete an evaluation form which you will discuss orally with the students.	8. Repeat step 6.
9. Have students make necessary corrections on retrieved documents, if necessary.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 5

Task: Transcribe dictation using written and verbal communication skills and/or mechanical equipment to prepare documents according to the originator's specifications.

Achievement Indicators: The learner:

	Yes	No
1. Set up supplies and equipment -		
2. Reviewed documents to be transcribed:		
a. read dictation notes or listened to instructions on pre-recorded media -		
b. selected proper document paper supplies -		
c. selected proper document format		
d. inserted proper punctuation -		
e. used dictionary or other reference materials as needed -		
3. Typed document -		
4. Proofread document -		
5. Corrected all errors -		
6. Submitted document to originator -		

Criteria: Competence in the task will be recognized when the procedure is performed according to the originator's specifications.

Tools and Equipment:
transcription unit; pre-recorded media; program diskette; student diskette

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the supplies needed for this particular document.	1. Read through notes or listen to prerecorded material making notations for inserting proper punctuation and words to be checked for correct spelling.
2. Prepare the equipment to be used.	2. Use the dictionary or other reference materials as needed.
3. Review comma rules applicable to this document.	3. Proofread the document before printing the final copy.
4. Discuss any questions the students may have.	4. Submit the completed document to the instructor and then to the originator.
5. Explain the proper format for this particular document.	5. Make any corrections needed on the retrieved document and print out again.
6. Show the students the needed sections in the reference guide for format changes and printing out document.	6. Practice proofreading using an exercise similar to the document to be produced.
7. Discuss briefly the functions to be used in transcribing materials using mechanical equipment.	7. Complete exercises to familiarize use of reference materials (dictionary, reference guide, reference manual for mechanical equipment).
8. Orally give the students the necessary directions and observe the students' recording of these directions and follow through.	8. Identify the document for future recall.
9. Be available to answer any questions.	
10. Show posters of similar finished documents explaining format changes.	
11. Check transcribed document/transcript for errors and proper format/form for mailable form.	
12. Have originating personnel complete an evaluation form which you will discuss orally with the students.	
13. Have students make corrections on the produced copy if necessary and have them submit a final copy for approval.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 6

Task: Examine documents using visual and written communication skills to verify completeness, accuracy, authenticity and format.

Achievement Indicators: The learner:	Yes	No
1. Gathered documents to be examined -	____	____
2. Verified accuracy of written data (statistics, pagination, content, completeness, clarity, source, punctuation, grammer, format, spelling, context, etc.) -	____	____
3. Verified accuracy of numerical data -	____	____
4. Inspected/examined documents for neatness and legibility -	____	____
5. Verified completeness of data -	____	____
6. Marked/corrected errors -	____	____
7. Rechecked corrections -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:	**Resources:**
documents	See Bibliography.

Teacher Activities	Student Learning Activities
1. Have students proofread on their own an original and a newly typed document to see if they can find all errors in typing, punctuation, spacing, and format.	1. Take pre-test.
2. Prepare and administer pre-test on achievement indicators.	2. Volunteer to proofread another document to the entire class.
3. Discuss results of pre-test.	3. Get in to teams and verbally proofread documents.
4. Explain why proofreading is an important task and why each person should learn to proofread accurately by himself/herself and with another person. Discuss implications of not finding major errors in technical documents resulting in negative consequences for the company.	4. Set up a work station for proof reading documents. Submit original rough draft and typed copy for proofing.
5. Role-play the correct way for verbally proofreading a document with another person.	
6. Role-play the correct way of proofreading a document alone.	
7. Administer post-test on achievement indicators.	
8. Restate why proofreading is important and how it is part of the job requirements irregardless of which secretarial/clerical position the student performs.	
9. Administer a post-test having students perform as teams to verify accuracy of document.	
10. Administer a post-test having students proofread a document to see if they find all errors.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 7

Task: Review documents using visual and written communication skills to determine how to incorporate proposed changes.

Achievement Indicators: The learner:	Yes	No
1. Retrieved proofread/examined document -	____	____
2. Reviewed edited notations -	____	____
3. Verified the accuracy of edited notations in regard to accuracy of content, clarify of expression, etc. -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures.

Tools and Equipment:

documents

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test on achievement indicators. 2. Discuss results of pre-test. 3. Discuss importance of consistency of using proofreading symbols for changes in various documents. Tell students that changes made by an originator may not be grammatically correct and typist is responsible for checking accuracy and consistency of revisions with regard to content/format/grammar. 4. Review procedure for retrieving a document for review. 5. Demonstrate both procedures for proofreading revisions that have been made using a chart of revision symbols, original source document and revised document. 6. Demonstrate proper procedure for communicating verbally and/or in written form inconsistencies in content/format/grammar to originator. 7. Restate why proofreading corrections/additions/deletions is just as important as proofreading an original document.	1. Type rough draft assignment which contains proofreaders symbols and errors in grammar and consistency. Use chart of company revision symbols. 2. Given a sample of revised copy identify inconsistencies which were not caught by the proofreader and/or typist. 3. Using a rough draft assignment which contains an obvious error in consistency, communicate verbally with instructor before completing assignment.

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 8

Task: Scan incoming correspondence using visual communication skills to highlight major facts within correspondence.

Achievement Indicators: The learner:

	Yes	No
1. Gathered incoming correspondence -		
2. Opened incoming correspondence unless marked confidential -		
3. Read opened documents/correspondece -		
4. Highlighted major facts within correspondence:		
a. annotated in margins, if necessary -		
b. pulled previous correspondence from files, if necessary -		
c. verified mathematical computations, if necessary -		
d. checked dates and times mentioned, if ncessary -		
5. Placed correspondence on employer's desk in order of importance -		

Criteria: Competence in the task will be recognized when the procedure is performed according to the prescribed procedures.

Tools and Equipment:
files, calculator; calendar; mail opener; mail date stamp

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Brainstorm on what kinds of mail students receive and what he/she would open first, i.e., personal letters, advertising, report card, etc.).	1. Highlight and verify one document which contains reference to previous correspondence, numeric data, and meeting dates..
2. Prepare and administer pre-test on achievement indicators.	2. List sources to use to verify other information and determine what previous correspondence to pull from files.
3. Discuss results of pre-test.	
4. Show filmstrip or slide/tape on highlighting and prioritizing mail.	
5. Demonstrate with a series of documents how to highlight important points and verify details before prioritizing documents for the supervisor.	
6. Restate why prioritizing mail and highlighting facts within correspondence is important in freeing the supervisor for more important activities.	
7. Administer post-test on achievement indicators.	

Duty:	Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 9

Task: Review incoming correspondence using visual and written communication skills to formulate reply.

Achievement Indicators: The learner:

	Yes	No
1. Gathered incoming correspondence -		
2. Read incoming documents -		
3. Determined appropriate type of response (memo, letter, report, etc.) -		
4. Determined urgency of reply for each document -		
5. Drafted response/reply for each document -		
6. Reread and corrected responses/replies -		
7. Prepared final copy -		

Criteria: Competence in the task will be recognized when the procedure is performed according to the prescribed procedures.

Tools and Equipment:
typewriter

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Brainstorm on what response to use for inquiry by a neighbor, teacher, insurance company, department store, etc.	1. Rank incoming mail by urgency of reply.
2. Prepare and administer pre-test on achievement indicators.	2. Using several response forms, determine the appropriate document form to use after reading incoming correspondence.
3. Discuss results of pre-test.	3. Construct an appropriate reply to an inquiry using a list of paragraphs responses.
4. Review with students the concept of routine reports.	4. Construct the appropriate document by selecting the correct paragraphs, putting them into the proper sequence in the document and typing the document in final form.
5. Demonstrate to students how to read incoming correspondence to determine nature of inquiry, determine the appropriate response document, prioritize as to urgency of importance, draft a reply, prepare final copy, and proofread document.	5. Proofread work to make sure all changes have been made and all paragraphs used were consistent and accurate.
6. Explain why efficient business communications can be achieved through the use of form paragraphs in various documents.	6. Take a pre-test.
7. Administer post-test on achievement indicators.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 10

Task: Collate documents using manual techniques to assemble documents in proper sequence.

Achievement Indicators: The learner:

	Yes	No
1. Arranged copies on a surface or in collator in proper sequence -	____	____
2. Assembled document packages consisting of one page from each stack of sequenced copies -	____	____
3. Stored collated document packages properly -	____	____
4. Cleaned work area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines and/or knowledge of collating.

Tools and Equipment:
collator device (not mechanical)

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask students how many have ever helped to put pages in order and stampled them into packets.	1. Collate material for in class or for various teachers in the building or for office staff. Use check sheet for evaluation of task.
2. Indicate that not all businesses have collating equipment and must therefore use manual techniques to put their material together.	2. Using a packet of 3 x 5 cards with pre-printed information, arranged the cards in numerical order for filing or distribution. Use check sheet from previous task for evaluation.
3. Give pre-test if appropriate.	
4. Explain meaning of manual techniques versus mechanical equipment in collating.	
5. Show pictures of steps one would go through to manually collate (make own slides of how to do it -- perhaps take picture of student performing it out on the job. If you have an advisory committee or contact with local business, perhaps you could ask them to take pictures for you of each step they perform in the task). Explain steps/ achievement indicators.	
6. Demonstrate task by performing all indicators to manually collate a small packet -- perhaps could be one of their assignment packets.	
7. Review when collating manually could be done; how it is done and wney it is important as a task.	
8. Administer post-test.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 11

Task: Collate documents using mechanical equipment to assemble documents in proper sequence.

Achievement Indicators: The learner:	Yes	No
1. Manipulated the proper switches, keys or levers to activate the system -	____	____
2. Arranged document copies in proper sequence -	____	____
3. Inserted document copies into collator in proper sequence -	____	____
4. Manipulated proper switches, keys, or levers to collate the document copies -	____	____
5. Removed the collated copies from collating device -	____	____
6. Manipulated proper switches, keys, or levers to deactivate the collating -	____	____
7. Stored collated copies properly -	____	____
8. Cleaned work area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established guidelines and/or knowledge of collating.

Tools and Equipment:
collator divider

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain to students that they will learn to collate documents using mechanical equipment.	1. Read from textbooks such as: Secretarial Office Procedures by South Western Publishing Company or Gregg Publishing Company's Office Procedures book, the chapters on using collating equipment and applying collating techniques.
2. Show collator and explain what it is. If there is no collator in the building, locate pictures of various models from vendors or, invite vendor to bring in small model and show its operation.	2. Write report or short paper on collators. It will be evaluated not only for content, but also on how it is typed, proofreading, spelling, use of English, etc. Checksheet will indicate how evaluation is done.
3. Explain steps for performing the task.	
4. Prepare assignment in accordance with available equipment.	
5. Go back over the reason for doing this task as well as reviewing the achievement indicators.	
6. Administer a post-test.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 12

Task: Staple documents using mechanical equipment or manual techniques to fasten documents.

Achievement Indicators: The learner:	Yes	No
1. Assembled collated documents to be stapled -	____	____
2. Inserted one collated document into stapler -	____	____
3. Activated mechanical stapling device switch or depressed manual stapler -	____	____
4. Removed stapled document from stapler -	____	____
5. Stored collated/stapled materials properly -	____	____
6. Cleaned work area -	____	____

Criteria: Competece in the task will be recognized when the procedure is performed according to established guidelines and/or knowledge of stapling procedures.

Tools and Equipment:

stapler/mechanical stapling device

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain the reasons for performing the task of stapling documents using either stapler or mechnical equipment. 2. Show at least one example of a piece of mechanical equipment for stapling. If the school does not own one, check with local business and see if you can borrow one. Also show manual stapler. Explain operation of each. 3. Demonstrate how to use both the manual stapler and the mechanical stapling device on some previously assembled, collated documents. 4. Show the collated documents to be stapled. 5. Have students perform exercises appropriate for available equipment. 6. Restate the task's purpose and how to perform the task with either manual stapler or mechanical stapler. Indicate how this is part of their job goal. 7. Administer a post-test.	1. Read assignment from textbooks which may have specific information on the task (example: Office Procedures by Gregg, McGraw-Hill Publishing Company whos picture and has brief explanation). 2. Demonstrate proficiency in operating stapling devices by doing it in classroom or for other teachers or for office staff. 3. Complete post-test.

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 13

Task: Compose correspondence using verbal or written skills and appropriate forms to communicate information to correspondent.

Achievement Indicators: The learner:	Yes	No
1. Determined appropriate type of correspondence -	____	____
2. Determined document format -	____	____
3. Gathered needed information (dates, computations, requisition numbers, etc.) -	____	____
4. Composed document -	____	____
a. statement of message b. details of message c. statement of desired action d. used dictionary and other reference materials if applicable		
5. Proofread and corrected documents -	____	____
6. Prepared final copy -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:
typewriter

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test based on parts of a letter.	1. Complete a pre-test.
2. Discuss results of pre-test.	2. Participate in group composition activity.
3. Give oral presentation on the types of correspondence which are generated within an office for communicating information.	3. Complete textbook related readings and activities.
4. Handout and discuss samples of correspondence which are generated in an office for communicating information.	4. Participate in small group activity to edit and critique letters.
5. Demonstrate the parts of a letter (see achievement indicator #4).	5. Participate in role-playing activity.
6. Lead group activity in composing a letter.	6. Participate in case studies' discussion.
7. Assign and administer textbook related reading and activities.	7. Complete a post-test.
8. Create or obtain letters for students to edit and critique in small groups.	
9. Give presentation on verbal communication techniques used to communicate information.	
10. Create and administer role-playing activity on communicating information.	
11. Acquire/create case studies on communicating information. Discuss in large and/or small group discussion.	
12. Prepare and administer post-test based on achievement indicators.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 14

Task: Compose correspondence using verbal or written skills and appropriate forms to request information from correspondent.

Achievement Indicators: The learner:	Yes	No
1. Determined appropriate type of correspondence -	____	____
2. Determined document format -	____	____
3. Gathered needed information (dates, computations, requisition numbers, etc.) -	____	____
4. Composed document - a. statement of request b. details of request c. statement of desired action d. used dictionary and other reference materials if applicable	____	____
5. Proofread and corrected document -	____	____
6. Prepared final copy -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:
typewriter

Resources:
See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Review and discuss post-test from previous task E-13. 2. Give oral presentation on the types of correspondence which are generated within an office for requesting information. 3. Handout and discuss samples of correspondence which are generated in an office for requesting information. 4. Demonstrate the parts of a letter (see achievement indicator #4). 5. Lead group activity in composing a letter requesting information. 6. Assign and administer textbook related reading and activities. 7. Create or obtain letters for students to edit and critique in small groups. 8. Give presentation on verbal communication techniques used to communicate information. 9. Create and administer role-playing activity on requesting information. 10. Acquire/create case studies on requesting information. Discuss in large and/or small group discussion. 11. Prepare and administer post-test based on achievement indicators.	1. Complete a pre-test. 2. Participate in group composition activity. 3. Complete textbook related readings and activities. 4. Participate in small group activity to edit and critique letters. 5. Participate in role-playing activity. 6. Participate in case studies' discussion. 7. Complete a post-test.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 15

Task: Produce documents using composition skills and appropriate terms to communicate information.

Achievement Indicators: The learner:	Yes	No
1. Determined appropriate type of document (letters, memos, reports, etc.) -	____	____
2. Determined format -	____	____
3. Gathered needed information -	____	____
4. Composed document - a. statement of message b. details of message c. statement of desired action d. used company handbook, if applicable	____	____
5. Reread and corrected document -	____	____
6. Prepared final copy -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to instructions from the requester.

Tools and Equipment:	**Resources:**
documents	See Bibliography.

Teacher Activities	Student Learning Activities
1. Give students a letter for which they need to write a response.	1. Obtain an instruction sheet.
2. Give no instruction on what to say or how to compose it.	2. Compose responses to selected letters and/or memos using an instruction sheet prepared by instructor.
3. After the allotted time has lapsed, discuss the format they used, how they decided on that format and what they wrote in the letter.	3. Have responses evaluated based upon whether or not achievement indicators were met. Make corrections and submit a final copy if necessary for approval.
4. Administer a pre-test.	
5. Explain the skill you are attempting to impart: the skill of producing documents using composition skills and the appropriate forms to communicate information.	
6. Tell why this is an important skill. If students can produce documents by using the correct/acceptable composition skills, they will be able to effectively communicate information to others.	
7. Show two transparencies side by side; one transparency depicting an incoming letter and the other depicting a letter which responds to the incoming letter. Use these written letter visuals to discuss and explain each achievement indicator for the task.	
8. Show another letter or memo which requires a response. Distribute a worksheet which incorporates the achievement indicators and instruct students to work through the achievement indicators so they produce an acceptable document using composition skills. Students will receive feedback from an achievement indicator checklist which incorporates grammar, punctuation and proofreading skills. Student letter response will also be checked for correct spelling.	
9. Summarize the components of this task and indicate importance of this skill to their job area.	

10. Administer a post-test.

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 16

Task: Prepare worksheets using composition skills and appropriate forms to communicate information.

Achievement Indicators:

The learner:	Yes	No
1. Reviewed author's requirements -	____	____
2. Selected appropriate worksheets (work requisition forms, payroll forms, survey forms, purchase order, requisition forms, travel logs, telephone logs, etc.) -	____	____
3. Completed worksheet -	____	____
4. Verified accuracy of information -	____	____
5. Distributed completed worksheet to proper destination -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to author's request and prescribed procedures.

Tools and Equipment:
worksheets

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss students' uses and knowledge of a variety of worksheets by displaying various forms on an overhead transparency. 2. Give a pre-test. 3. State specific task being taught. 4. Tell why the task is important: if students can prepare worksheets by using composition skills and appropriate forms they will effectively communicate information. 5. Distribute an example of a completed worksheet to students, along with a copy of the achievement indicators. 6. Explain how each indicator has been developed on the worksheet. 7. Answer questions. 8. On a handout or transparency, show an author's requirements for a specific request. Discuss and select correct form. 9. Using a blank transparency of that form complete it with students' help. 10. Review the form for accuracy and discuss with students proper routing procedures. 11. Summarize what has been taught, why it is important and how it is performed. 12. Review how forms fit in with various jobs. 13. Give a post-test.	1. Read from class textbooks. 2. Use simulations for practice. 3. Work in school office completing different forms and have supervisor evaluate work. 4. Practice proofreading using completed forms.

Duty: Preparing Documents, Correspondence and Reports	**Duty No.** E
	Task No. 17

Task: Arrange data using established guidelines to organize infomration in tabular form.

Achievement Indicators: The learner:

	Yes	No
1. Determined document format-	____	____
2. Selected appropriate supplies -	____	____
3. Activated device/system -	____	____
4. Manipulated keys, levers, switches to :		
a. set margins -	____	____
b. set tabs -	____	____
c. adjust line-space regulator -	____	____
5. Typed document in tabular form -	____	____
6. Where applicable, manipulated keys, levers, switches to store the document -	____	____
7. Verified numeric data -	____	____
8. Proofread typed data -	____	____
9. Made necessary corrections -	____	____
10. Where applicable manipulated keys, levers, switches to record corrections -	____	____
11. Printed the corrected document -	____	____
12. Submitted document for approval -	____	____
13. Where applicable, deactivated the system -	____	____

Criteria:	Competence in the task will be recognized when the procedure is performed according to prescribed procedures, operator's manual and established guidelines.

Tools and Equipment:	**Resources:**
word processor; system software; program disk; math pack; typewriter	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students procedures to activate the word processor and print a document. 2. Prepare and administer pre-test on achievement indicators. 3. Discuss results of pre-test. 4. Demonstrate how to determine tab stops for a tabulated document and how to set margins and tabs. 5. Demonstrate procedure to format information into tabular form, set margins and tabs, and type tabulated document. 6. Demonstrate procedure to set up information in tabular form using software available (i.e., document format, change margins and tabs, determine tab choices), keyboard information, and print document. 7. Summarize procedures and explain how it is important to understand procedures for setting up a document before typing it. 8. Administer post-test on achievement indicators.	1. Type a tabulated document. 2. Type a tabulated document on the word processor. 3. Set up a word processor for a tabulated document, keyboard the document, store the document, and print the original copy. Proofread the end result, correct and/or revise the end result using proofreading symbols. Keyboard the corrections. Print the revised copy and distribute document to appropriate principals.

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 18

Task: Categorize data using established guidelines to classify information.

Achievement Indicators: The learner:

The learner:	Yes	No
1. Reviewed company procedures to classify information -	____	____
2. Determined appropriate reporting procedure (verbal, written, print-out, etc.) -	____	____
3. Determined classification sequence -	____	____
4. Sequenced the data -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedure.

Tools and Equipment:
horizontal files for computer printouts

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Brainstorm classification system for music, i.e., classical rock, etc. Then brainstorm how a different classification can be used, i.e., female/male singers, etc. 2. Prepare and administer pre-test on achievement indicators. 3. Discuss results of pre-test. 4. Explain why certain classifications are given for data in a business office so as to simplify data gathering for different departments. 5. With a computer printout of sales, quarterly reports of sales, and other source documents, demonstrate to students how to extract the necessary information from one/ or all of these documents to complete a report of: a. sales by type of customer for marketing department. b. total sales by product for the manufacturing department. c. sales by region for the accounts receivable department. d. sales by salesperson for the payroll department. 6. Administer post-test on achievement indicators. 7. Restate how information from one or more documents can be extracted and reclassified or summarized to meet reporting requirements of certain departments, i.e., payroll, accounting, marketing, etc.	1. Take a pre-test. 2. Take source documents, computer printouts, and sales reports from files and regroup data in several categories to produce a report by: a. amount of sales b. territories c. salesperson d. product line 3. Take a post-test.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 19

Task: Number documents using mechanical equipment or manual techniques to sequence pages.

Achievement Indicators: The learner:	Yes	No
1. Gathered documents to be numbered -	____	____
2. Manipulated keys, levers, switches to activate system/device -	____	____
3. Determined proper number sequence (A-1, 1-1, etc.) -	____	____
4. Arranged documents in proper sequence -	____	____
5. Numbered documents -	____	____
6. Manipulated keys, levers, switches to deactivate system/device -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and operator's manual.

Tools and Equipment:	**Resources:**
word processor; numbering machine	See Bibliography.

Teacher Activities	Student Learning Activities
1. Brainstorm ways of numbering a term paper of 30 pages when several pages have been completed and several sections still have to be written.	1. Read assigned material on pagination in operator's manual.
2. Prepare and administer pre-test on achievement indicators.	2. Observe demonstration of procedure for pagination.
3. Review with students procedure to activate word processor, request the index/director, locate a document, and print a document.	3. Activate word processor and complete exercise in operator's manual to create an paginate a multi-page document.
4. Answer questions students may have on assigned reading from operator's manual.	4. Deactivate word processor if necessary.
5. Demonstrate to students procedures to re-paginate a multi-page document after deletions and additions have been processed.	5. Answer review questions in operator's manual.
6. Restate why pagination software can be a timesaver when a multi-page document is in draft form.	6. Submit printed exercise and review questions for approval.
	7. Correct exercise and answer if not completed accurately.
	8. Activate word processor and complete exercise in operator's manual for a revised and repaginated multi-page document.

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 20

Task: Prioritize jobs using priority schedules to produce documents on a timely basis.

Achievement Indicators: The learner:	Yes	No
1. Reviewed employer's priority specifications -	____	____
2. Examined tasks to be performed -	____	____
3. Assigned work priorities considering:		
a. due date -	____	____
b. logical progression of tasks -	____	____
c. complexity of work -	____	____
4. Gathered necessary supplies and information for completing each task -	____	____
5. Allowed adequate time for completion of each task -	____	____
6. Allowed time for necessary routine duties -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:	**Resources:**
schedules	See Bibliography.

Teacher Activities	Student Learning Activities
1. Brainstorm words used to complete an activity ASAP (as soon as possible).	1. Receive assignments for a 2 week period.
2. Prepare and administer a pre-test on achievement indicators.	2. Plan work for the next 2 weeks by gathering all necessary materials and estimating time to complete each assignment taking into account routine activities.
3. Discuss results of pre-test.	3. Plan work for the next 2 weeks by prioritizing assignments through a priority coding system given by teacher, gathering all necessary materials, and estimating time to complete each assignment taking into account routine activities.
4. Discuss importance of prioritizing in increasing efficiency of work, office, and company.	4. Scan documents for any employer priority codes.
5. Show filmstrip on time management.	5. Take a post-test.
6. Demonstrate procedure for scanning correspondence to determine priority codes considering time, complexity, and logical order.	
7. Demonstrate procedure for coding documents by priority code and estimating time for completion taking into account routine tasks.	
8. Give summary of how students can increase their efficiency and get more work done if they plan their time and prioritize their work.	
9. Administer a post-test.	

Duty: Preparing Documents, Correspondence, and Reports

Duty No. E

Task No. 21

Task: Gather data using reference materials and resources to compile document information.

Achievement Indicators: The learner:	Yes	No
1. Researched appropriate reference materials -	____	____
2. Selected the appropriate information -	____	____
3. Posted information into proper sequence -	____	____
4. Recorded data -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment:
file cabinet

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students the concept of routine reports.	1. Obtain a list of reports to be compiled and several source documents available. Determine which reports can be compiled from sources indicated.
2. Prepare and administer pre-test on achievement indicators.	2. Complete an in-basket exercise which includes using various sources to compile a report.
3. Discuss results of pre-test.	3. Take a post-test.
4. Give students a sample of year end report, 4 quarterly reports, and 3 monthly sales reports.	
5. Explain to students how each succeeding report was compiled from several preceeding ones.	
6. Demonstrate to students method for obtaining information from various sources.	
7. Have students complete in-basket exercise which includes using various sources to compile a report.	
8. Restate how routine reports can be prepared from existing documents and how a secretary can compile routine reports by extracting necessary information from various source documents available to him/her.	
9. Administer a post-test.	

Duty: Preparing Documents, Correspondence, and Reports	**Duty No.** E **Task No.** 22

Task: Compile reports using appropriate forms, reference materials, resources, and composition skills to provide information.

Achievement Indicators: The learner:

	Yes	No
1. Gathered appropriate materials -	____	____
2. Prepared:		
a. report format -	____	____
b. report heading -	____	____
c. reporting date -	____	____
3. Recorded information/data in proper form -	____	____
4. Verified the accuracy of the date -	____	____
5. Performed calculations, if necessary -	____	____
6. Proofread report -	____	____
7. Made any necessary corrections -	____	____
8. Submitted for approval -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards.

Tools and Equipment: appropriate forms, reference materials, resources	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Brainstorm what information would be needed to prepare a personal data sheet using several different formats. Discuss where information can be obtained. 2. Prepare and administer pre-test on achievement indicators. 3. Discuss results of pre-test. 4. Explain to students that some documents to be prepared will be routing ones that the supervisor will expect the secretary to be able to complete without assistance or input from the supervisor on every detail of the document. 5. Write achievement indicators on the blackboard and discuss steps to complete a report from various source documents. 6. Hand out an in-basket exercise which contains an original format, variable information, other source documents, and blank forms and have students select the appropriate form, record the infomration in the correct spaces, determine what information is missing and where to obtain missing information, proofread calculations if necessary, and type a final copy for approval. 7. Give a summary and restate why a secretary can help the supervisor with routing documents by looking at a completed form from the files and completing the form accurately for each new occurence. 8. Administer post-test on achievement indicators.	1. Obtain a list of routine reports and a list of source documents available and identify which reports can be compiled from the list of source documents. 2. Complete exercise which includes those items discussed in the presentation. 3. Take a pre-test and a post-test.

Duty: Maintaining Files, Records, and Logs

Duty No. F

Task No. 1

Task: Maintain records and files using knowledge of records, management procedures to store information.

Achievement Indicators: The learner:

	Yes	No
1. Reviewed present records management procedures -	_____	_____
2. Determined appropriate filing sequence, i.e., alphabetic, numeric, geograhic, subject, etc. -	_____	_____
3. Collected items to be filed -	_____	_____
4. Indexed and coded documents -	_____	_____
5. Cross referenced where appropriate -	_____	_____
6. Sorted documents in desired sequence -	_____	_____
7. Filed documents in designated storage area -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:

procedures manual; file box; material to be filed; dividers and file folders

Resources:

See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" pre-test over filing systems and discuss.	1. Complete pre-tests.
2. Prepare and administer pre-test over alphabetic filing and discuss.	2. Participate in visitations, demonstration, and/or field trip. Prepare short summary report over each.
3. Visit and observe the school's filing system. Have the secretary explain their system and discuss.	3. Complete textbook and practice set related assignments.
4. Demonstrate and show the students the instructor's filing system and discuss.	4. Complete a post-test.
5. Visit a local company's records department to observe and discuss their filing procedures. Take slides for future use. Discuss	
6. Assign textbook related reading assignment.	
7. Give an orgal presentation on the four filing systems: alphabetic, numeric, geographic, and subject. Demonstrate methods.	
8. Discuss and demonstrate cross referencing.	
9. Assign related textbook and practice set assignments for the following filing systems: alphabetic, numeric, geographic, and subjective.	
10. Prepare and administer objective test(s) over each filing system based on achievement indicators and lecture.	
11. Administer publisher prepared performance tests based on practice set materials.	

Duty: Maintaining Files, Reocrds, and Logs

Duty No. F

Task No. 2

Task: Maintain records and files using knowledge of records management procedures to retrieve information.

Achievement Indicators: The learner:

	Yes	No
1. Sorted requests -	____	____
2. Located file folder for each request, one at a time:		
a. abstracted information requested if appropriate -	____	____
b. recorded abstract information -	____	____
c. pulled desired documents where appropriate -	____	____
d. recorded the removal from the file -	____	____
e. determined record retention procedures for purging -	____	____
3. Copied material where appropriate -	____	____
4. Handled confidential material in appropriate manner:		
a. only gave to qualified personnel -	____	____
b. did not discuss contents -	____	____
5. Gave information to person requesting the data -	____	____
6. Placed purged documents in designated storage areas -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:
procedures manual; file box; filed material; request forms

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer objective pre-test over filing rules and cross-referencing. 2. Discuss pre-test results. 3. Discuss and demonstrate appropriate methods to retrieve and trace information in and from filing systems with documentation (coding, updating, etc.). 4. Invite a local business' file clerk to visit to discuss filing systems, cross-referencing, and documentation. 5. Assign and administer textbook and practice set related assignments. 6. Assign students to work in school offices filing and retrieving information on a daily basis. Have office staff assess their ability. 7. Administer publisher prepared performance test(s) based on practice set materials.	1. Complete a pre-test. 2. Complete short summary on speaker. 3. Complete textbook and practice set related assignments. 4. Participate in on-site filing activity. 5. Complete a post-test.

Duty: Maintaining Files, Records, and Logs

Duty No. F

Task No. 3

Task: Maintain records and logs using knowledge of records management procedures to produce production reports or cost accounting reports.

Achievement Indicators: The learner:

	Yes	No
1. Reviewed company procedures for production/cost accounting reports management -	____	____
2. Reviewed present production/cost accounting reports procedures -	____	____
3. Retrieved various production/cost accounting reports from designated individuals -	____	____
4. Selected proper production/cost accounting reporting form -	____	____
5. Logged required production/cost accounting information -	____	____
6. Filed production/cost accounting form in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:
production reporting form samples; cost accounting reporting form samples

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss what the terms production report and cost accounting report mean to students.	1. Participate in discussion.
2. Prepare and administer a pre-test on filling out forms based on achievement indicators and discuss.	2. Complete a pre-test.
3. Demonstrate the methods to complete production and cost reports.	3. Complete form with instructor during demonstration.
4. Distribute samples of completed forms from business and discuss.	4. Complete simulated activity.
5. Prepare and administer simulated activity based on achievement indicators.	5. Complete a post-test.
6. Prepare and administer post-test based on achievement indicators.	

Duty: Maintaining Files, Records, and Logs

Duty No. F

Task No. 4

Task: Maintain records and logs using knowledge of records management procedures to control work flow.

Achievement Indicators: The learner:

	Yes	No
1. Reviewed company procedures for work flow management -		
2. Reviewed present work flow procedure -		
3. Selected proper work flow log, i.e., turnaround form, document analysis form -		
4. Logged proper information, i.e., author, method of input, document category, time in, time out, etc. on work flow log -		
5. Filed work flow log in designated area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards and established work flow records management procedures.

Tools and Equipment:
file box; sample work flow log

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test based on achievement indicators. 2. Discuss the results of the pre-test. 3. Give an orgal presentation on the importance of work flow. 4. Distribute and discuss sample work flow logs. 5. Prepare and administer role-playing activity based on work flow situations. 6. Demonstrate how to complete a work flow log and discuss. 7. Assign related textbook reading and activities. 8. Assign students to keep a work flow log of their production on a weekly basis. 9. Prepare and admister post-test based on achievement indicators.	1. Complete a pre-test. 2. Participate in role-playing. 3. Complete work log with instructor's demonstration. 4. Complete textbook related assignments. 5. Complete weekly work logs. 6. Complete post-test.

Duty: Duplicating and Assembling Documents	**Duty No.** G **Task No.** 1

Task: Duplicate documents using copying machine to reproduce information.

Achievement Indicators: The learner:

	Yes	No
1. Selected the proper supplies to load the copy machine -	____	____
2. Loaded the supplies to prepare the machine for operation -	____	____
3. Manipulated the proper switches, keys, or levers necessary to activate the device -	____	____
4. Manipulated the appropriate switches, keys, or levers necessary to set the proper number of copies -	____	____
5. Inserted the master (original) copy into copying machine -	____	____
6. Manipulated the proper keys or levers to operate the device -	____	____
7. Stored supplies/copies properly upon completion of copying -	____	____
8. Selected proper log form, i.e., author, operator, department, etc. -	____	____
9. Logged proper information -	____	____
10. Cleaned equipment and work area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's instructions and established guidelines.

Tools and Equipment: copier; supplies; log	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Explain why copies are kept on file for each document used in an office.	1. View demonstration on the operation of equipment to be used.
2. Give students the appropriate information on copying materials - carbon to photocopying.	2. Read assigned materials.
3. Review machines or files where documents or media is stored.	3. Using appropriate materials and equipment, perform the copying tasks assigned.
4. Demonstrate copier available for use to the class.	4. Submit completed assignments to the instructor for evaluation.
5. Demonstrate how to use the operator's manual.	5. Review returned project with instructor and make any appropriate corrections.
6. Demonstrate the proper logging procedures.	
7. Assign any reading material available or teacher made handouts.	
8. Assign student exercises.	
9. Evaluate student performance according to achievement indicators.	
10. Review exercises with students.	

Duty: Duplicating and Assembling Documents	**Duty No.** G **Task No.** 2

Task: Photograph documents using microfilming device to reproduce documents or microfilm.

Achievement Indicators: The learner:

	Yes	No
1. Manipulated switches, keys, or levers to activate the device -	____	____
2. Established filing sequence -	____	____
3. Inserted master in microfilming device -	____	____
4. Manipulated switches, keys, or levers to photograph the masters -	____	____
5. Removed masters from the microfilming device -	____	____
6. Manipulated keys, switches, or levers to deactivate the device -	____	____
7. Stored materials properly -	____	____
8. Cleaned work area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to prescribed procedures and established guidelines.

Tools and Equipment:	**Resources:**
microfilmer	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss the need for eliminating the large volumn of paper.	1. Read assigned text materials or handouts.
2. Discuss storage space limitations.	2. Participate in field trip for demonstration of microfische and film to determine the uses for storage.
3. Using the MOIS (Michigan Occupational Information System) demonstrate a document stored on microfische.	3. Using microfische or microfilmed documents prepare a report on a topic assigned by the instructor.
4. Utilize community resources, such as a bank or library, to show how microfische and film is used to store documents.	4. Submit materials for evaluation.
5. Assign student exercises which allows them to use these two forms of micrograhics.	
6. Evaluate student exercises and discuss errors.	
7. Administer a post-test when appropriate.	

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test over filing systems and procedures and discuss. 2. Review weak areas with students. 3. Invite vendor in to discuss media maintenance techniques and procedures. 4. Demonstrate how to identify, log, and catalog file media. 5. Prepare and administer exercise related to step #4 and discuss. 6. Demonstrate how to store and file media appropriately. 7. Prepare and administer exercise related to topic #6. 8. Discuss and demonstrate the procedures the student should use to maintain classroom media. Students should participate in activity. 9. Prepare and administer objective post-test over information presented. 10. Students should be checked routinely against achievement indicators maintaining file media.	1. Complete a pre-test. 2. Participate in review over weak areas as indicated by pre-test. 3. Read related manufacturer's information. 4. Complete exercises related to media maintenance. 5. Maintain file media routinely and properly. 6. Take a post-test.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 2

Task: Activate word processor using appropriate control keys to prepare equipment for processing of information.

Achievement Indicators: The learner:

	Yes	No
1. Located the switches, keys, or levers necessary to activate the word processor -	____	____
2. Located appropriate software if necessary -	____	____
3. Manipulated the appropriate switches, keys, or levers necessary to provide power to the word processor -	____	____
4. Loaded the software properly to activate the system if necessary -	____	____
5. Checked lights, sounds, or other physical signs to assure the word processor was properly activated -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed as described in the operating manual for the word processor.

Tools and Equipment:
word processor: visual display terminal (VDT), electronic typewriter

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer "frame of reference" questionnaire on word processing equipment and terminology and discuss. 2. Have the equipment vendor/instructor demonstrate how to activiate the system(s). 3. Demonstrate to the students where the software is located and how to activate the system and prepare an student checklist. 4. Administer demonstrating post-test to student.	1. Complete a questionnaire. 2. Observe demonstrations. 3. Read assigned materials and complete appropriate exercise. 4. Practice activating the system. 5. Demonstrate to instructor how to activate the system. 6. Take a post-test.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 3

Task: Load software using appropriate commands to access software functions.

Achievement Indicators: The learner:

	Yes	No
1. Manipulated keys, levers, and switches to activate the word processor -	____	____
2. Located system software media -	____	____
3. Selected correct software program (math, forms, documents, etc.) -	____	____
4. Inserted software media into activated system -	____	____
5. Manipulated keys, levers, and switches to load system software -	____	____
6. Checked operator messages, lights, sounds, etc. to insure that the software was properly loaded -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the operator's manual.

Tools and Equipment:
hardware; software; storage unit

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss comparisons and contrasts of electric typewriter and word processor. 2. Reivew names of modules to be used in data entry. 3. Prepare the equipment to be used. 4. Show film #1 "What's It All About?" 5. Highlight the section of the operator's manual which shows in words and illustrations the correct method of loading the appropriate software into the system. 6. Point to modules as the name of each is repeated. 7. Demonstrate correct loading and activating of the system. 8. Take a field trip to a word processing center. 9. Have students activate the system and choose the correct software. 10. Have the students check the prompts and messages with the use of the operator's manual.	1. Read through section of operator's manual which explains loading appropriate software into the system. 2. Point to and name the parts of the word processor. 3. Explain orally the difference between the work software and the program software. 4. Activate the system and load the correct software.

Duty: Performing Word Processing Skills	**Duty No.** H **Task No.** 4

Task: Input information using keyboard to record documents.

Achievement Indicators: The learner:

	Yes	No
1. Read work requisition forms and originator documents -	____	____
2. Inserted storage media into activated system -	____	____
3. Manipulated keys, levers, and switches to name new document (made note of name) -	____	____
4. Manipulated keyboard to type new document using the system's automatic features -	____	____
5. Proofread new document (sent to spelling if hardware had that capacity) -	____	____

Criteria: Competence in the task will be recognized when the procedure is performing according to operator's manual, established procedures and knowledge of keyboard techniques.

Tools and Equipment:
hardware; software

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review correct procedures to follow in activating the system and choosing the appropriate software.	1. Read work requisition form and originator's documents.
2. Compare and contrast the keyboard of the typewriter to that of the word processor.	2. Read through section of operator's manual which explains how to create a new document.
3. Explain the work requisition form.	3. Activate the system and insert the correct storage media to create a new document.
4. Prepare equipment to be used.	4. Insert the storage media for work and manipulate the keyboard to name the new document.
5. Highlight the section of the operator's manual which shows in words and illustrations the correct method of creating a new document.	5. Record the name of the new document on the appropriate form.
6. Demonstrate the above.	6. Create new document according to directions in operator's manual.
7. Demonstrate correcting of errors function and display of input information.	7. Proofread new document and make necessary corrections.
8. Explain messages and prompts.	8. Send the new document to spelling if hardware has that capacity.
9. Explain importance of naming each new document and recording of that name for purposes of retrieving for revising or printing.	
10. Evaluate students' abilities and competence.	

Duty: Performing Word Processing Skills	**Duty No.** H **Task No.** 5

Task: Input information using keyboard to store documents.

Achievement Indicators: The learner:

	Yes	No
1. Manipulated keys, levers, and switches to store the newly created document on the storage media -	____	____
2. Logged newly created document on storage media log -	____	____
3. Manipulated keys, levers, and switches to remove storage media from system -	____	____
4. Filed storage media in designated storage area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and established records management procedures.

Tools and Equipment:
hardware; software; storage area for records management

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review tasks G3 and G4 in preparation of storing information on the storage media.	1. Read through section of operator's manual which explains ending and storing the newly created media.
2. Relate how stored information is similar to stored "out-of-season clothes" which can be retrieved when needed.	2. Input information to store documents.
3. Refer to the section of the operator's manual which guides the student in correctly storing the newly created media on the software.	3. Log the newly created document on storage media log.
4. Discuss the difference between the program software and the work software.	4. Remove storage media from the system.
5. Emphasize "ending" the newly created document so that it is not lost.	5. Store media in designated area.
6. Explain applicable prompts, messages, and menus.	
7. Demonstrate proper removal of software from system.	
8. Show the students the storage area for work software and explain the system used for records management.	
9. Observe the student as the storage media is removed from the system and stored in the records management area.	

Duty: Performing Word Processing Skills

Duty No. H

Task No. 6

Task: Enter stored media using keyboard commands to retrieve/recall text.

Achievement Indicators: The learner:

	Yes	No
1. Selected proper pre-recorded storage media -	____	____
2. Inserted storage media into activated system -	____	____
3. Manipulated keys, levers, and switches to retrieve media index/directory -	____	____
4. Identified desired document -	____	____
5. Manipulated keys, levers, and switches to retrieve desired document -	____	____
6. Checked information to verify that the proper document has been retrieved -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and establisned records management procedures.

Tools and Equipment:
hardware; software

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Cite to the students retrieval example: "this is like bringing "out-of season clothes" out of storage."	1. Read appropriate section of operator's manual.
2. Explain to students that for menu-driven systems only correlate the menus of the word processor with those of a restaurant.	2. Select proper pre-recorded storage media from the records management area.
3. Refer to the section of the operator's manual which explains retrieving documents.	3. Follow steps learned in G3 through G5 to activate the system and insert storage media to program and to record work.
4. Explain the expediency of retrieving documents rather than retyping them.	4. Choose the correct method to revise a document.
5. Review correct method necessary for this function, correlating them with restaurant menus.	5. Refer to the storage media log for the name of the document and enter this information into the system.
6. Show #6 "The Rules of the Game" film from the Word Processing Training Film Series.	6. Verify the text using the correct keys and levers.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 7

Task: Enter instructions using keyboard commands to print documents.

Achievement Indicators: The learner:	Yes	No
1. Read work requisition form -	____	____
2. Selected proper storage media containing desired document -	____	____
3. Inserted proper storage media into activated system -	____	____
4. Manipulated keys, levers, and switches to instruct the system as to which document was to be printed -	____	____
5. Manipulated keys, levers, and switches to print the document -	____	____
6. Logged printed document on records management form -	____	____
7. Distributed printed document to proper originator -	____	____
8. Manipulated keys, levers, and switches to remove storage media from system -	____	____
9. Filed storage media in designated storage area -	____	____
10. Manipulated keys, levers, and switches to deactivate the word processing system -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment:
hardware; software; records management form; storage equipment

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review that tangible proof of a newly created document is seeing it in print.	1. Read the appropriate section of the operator's manual which explains how to print documents.
2. Correlate the use of duplicating machines and copies with ability to revise without making a new original.	2. Read requisition form.
3. Demonstrate making a print out.	3. Choose the proper storage media from the records management area and insert it into the activated system.
4. Assign the reading of the operator's manual of appropriate section.	4. Refer to storage media log for the name of the document to be printed.
5. Assign the students to print the newly created document.	5. Follow the directions in the operator's manual to print a document.
6. Evaluate the printed document before it is returned to the originator. Observe the students as the steps to print a document are followed.	6. Proofread the printed document making proofreader's marks to indicate corrections.
	7. Distribute the printed document to the originator.
	8. Remove the storage media from the system and return it to the records management file.
	9. Deactivate the system.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 8

Task: Enter stored media using keyboard to revise text.

Achievement Indicators: The learner:

	Yes	No
1. Read work requisition form the originator's document -		
2. Identified information to be revised -		
3. Checked to make sure proper system software was loaded -		
4. Selected proper storage media containing desired document -		
5. Inserted proper storage media into activated system -		
6. Manipulated keys, levers, and switches to retrieve proper document -		
7. Manipulated keys, levers, and switches to search our proper revision area of document -		
8. Manipulated keys, levers, and switches to perform proper revisions (change, insert, delete, move, etc.) -		
9. Manipulated keys, levers, and switches to store the revised document on the storage -		
10. Manipulated keys, levers, and switches to print a copy of the revised document -		
11. Proofread revised document -		
12. Logged revised document on records management log -		
13. Distributed printed revised document to proper originator -		
14. Manipulated keys, levers, and switches to remove remove storage media from system -		
15. Filed storage media in designated storage area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, establishing guidelines, established records management procedures, and knowledge of text editing and keyboard techniques.

Tools and Equipment:	**Resources:**
hardware; software; form to record revision; storage equipment	See Bibliography.

Teacher Activities

1. Correlate to erasing and correcting errors with a pencil eraser:

   keyboard - pencil
   revision - eraser

2. Review G6 to retrieve text.
3. Demonstrate methods to be used to revise documents.
4. Demonstrate keys to be used in making the various kinds of revisions.
5. Assign students the reading and doing exercises in the operator's manual.
6. Have student retrieve revised text for viewing.

Student Learning Activities

1. Read the appropriate section of the operator's manual.
2. Read the work requisition and originator's document to determine the revisions to be made.
3. Select the proper software for loading the program to revise the text and working software to revise.
4. Review G3, 4, 5, and 6 task directions.
5. Use the correct keys and/or codes to make the proper revisions as to change, insertions, deletions, etc.
6. Proofread the revised document.
7. End the revised document.
8. Follow the directions in the operator's manual to proting a document.
9. Distribute the printed document to the originator.
10. Remove the storage media from the system and return it to the records management file.
11. Deactivate system.

Duty: Performing Word Processing Skills	**Duty No.** H **Task No.** 9

Task: Enter stored media using keyboard commands to communicate information.

Achievement Indicators: The learner:

	Yes	No
1. Selected proper communications software -	____	____
2. Inserted software media into activated system -	____	____
3. Manipulated keys, levers, and switches to load the communications software -	____	____
4. Checked to make sure that the necessary communication peripherals were activated -	____	____
5. Read work requisition form to identify information to be communicated -	____	____
6. Located proper storage media containing desired information -	____	____
7. Inserted proper storage media into activated system -	____	____
8. Checked with the receiver to verify that receiver was ready to receive -	____	____
9. Manipulated keys, levers, and switches to communicate the desired information -	____	____
10. Verified that receiver had received all the communications -	____	____
11. Manipulated keys, levers, and switches to terminate the communication -	____	____
12. Manipulated keys, levers, and switches to remove the communications software and storage media -	____	____
13. Filed storage media and communications software in designated storage areas -	____	____
14. Logged communications activity on proper records management forms -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and established records management procedures, and knowledge of keyboard techniques.

Tools and Equipment: hard wire connections or telephone modem; hardware; software; storage equipment	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Correlate daily use of the telephone with communication by hard-wire or telephone modem.	1. Read the section of the operator's manual to enter stored media using the keyboard commands to communicate information.
2. Show film #8 "Dictation - Napoleon to Now" (Word Processing Training Film Series) followed by discussion.	2. View film #8 "Dictation - Napoleon to Now".
3. Emphasize checking communication peripherals, identification of information, verification of ready receiver, proper termination of communication, and logging - discuss and demonstrate.	3. Watch the teacher demonstration.
4. Take a field trip to word processing center using telephone modems.	4. Follow the directions given verbally and in the operator's manual. Also, to be read is the work requisition from the originator.
5. Observe student go through the appropriate steps to communicate information.	5. Use packet material, faculty originated material, etc. for further practice.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 10

Task: Copy (stored) data using mechanical equipment or manual techniques to duplicate information from one document to another.

Achievement Indicators: The learner:

The learner:	Yes	No
1. Manipulated keys, levers, and switches to activate the device -		
2. Located proper storage media -		
3. Loaded previously keyed media into the device -		
4. Retrieved previously keyed document to be copied -		
5. Identified data to be copied from previously keyed document -		
6. Selected appropriate commands to perform copy function -		
7. Identified file onto which data will be copied -		
8. Completed/performed copy functions -		
9. Filed both documents -		
10. Unloaded media from device -		
11. Logged media properly -		
12. Deactivated the system/device -		

Criteria: Competence in the task will be recognized when the procedure is performed according to established standards and equipment manuals.

Tools and Equipment:
copier; media; log; word processor

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss with students a case example of how a secretary needs a copy of a document and one has it on a word processor, the other does not. 2. Explain the difference between the two methods - mechanical and manual - of reproducing a copy. 3. Administer a pre-test. 4. Demonstrate the case of retrieving a document from word processor for printing more copies. 5. Demonstrate copy equipment available to produce a copy of a document. 6. Demonstrate how to combine two documents to create one on each type of equipment. 7. Assign student exercises. 8. Evaluate students' exercises according to criteria established and review with students. 8. Administer a post-test.	1. View demonstration on each type of available equipment. 2. Compile information and instruction sheets to produce a merged document. 3. Using a checksheet, evaluate the completed assignment for the appropriate criteria. 4. Submit completed assignment for evaluation. 5. Complete a post-test.

Teacher Activities	Student Learning Activities
1. Redefine the methods of copying material.	1. View demonstration on various types of log forms.
2. Review equipment available.	2. Read any assigned text material.
3. Administer a pre-test.	3. Complete assigned material and submit to instructor for evaluation.
4. Discuss the need for keeping a record of copies produced on copying equipment.	4. Complete a post-test.
4. Display various log forms that may be used to record information.	
5. Demonstrate the log form to be used for the class exercises and how to record the appropriate information.	
6. Review students' assignments and discuss any errors on how to improve the technique.	
7. Administer a post-test.	

Duty:	Performing Word Processing Skills	**Duty No.**	H
		Task No.	12

Task: Maintain records and files using knowledge of records management procedures to store information.

Achievement Indicators: The learner:	Yes	No
1. Determined business needs for management of records i.e., alphabetic, numeric, subject, etc. -		
2. Manipulated keys, levers, and switches to activate the device -		
3. Selected approprite filing system, i.e., alphabetic, numeric, etc. -		
4. Loaded program software into word processing system -		
5. Loaded storage media into up device -		
6. Retrieved document index, i.e., author or operator document -		
7. Manipulated keys, levers, and switches to have document placed on storage media -		
8. Logged document media and operator/author information -		
9. Unloaded media from device -		
10. Unloaded program software from system -		
11. Deactivated the device -		
12. Placed media in designated storage area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:	**Resources:**
word processor; system software; program disk	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the need for a filing system. 2. Review disk capacity, deleting files, moving files, handling disks. 3. Discuss any questions the students may have. 4. Explain what it is necessary to provide storage and how it is different from filing typed documents. 5. Show slide presentation on filing systems: alphabetic, numeric, subject, etc. 6. Determine how to prepare disk for storage and who will prepare them (show transparency outlining steps). 7. Decide who files which documents and when. 8. Show students reference area for filing in manual. 9. Determine where disks will be stored. 10. Present types of operation: a. copy b. move c. retrieve d. delete	1. Do sample exercise of filing systems. 2. Read assigned section in the reference manual. 3. Listen to instructions before filing. 4. Prepare new disk. 5. Select type of operation requested (copying). 6. Following directions in manual - select "Document filing" from main menu. Select operations and method. 7. Insert archive disk and follow directions, completing procedure. 8. Have disk checked by instructor.

Duty: Performing Word Processing Skills	**Duty No.** H **Task No.** 13

Task: Maintain records and files using knowledge of records management procedures to retrieve information.

Achievement Indicators: The learner:

	Yes	No
1. Activated the device/system -	_____	_____
2. Inserted pre-recorded storage media into device -	_____	_____
3. Retrieved document index -	_____	_____
4. Read document index -	_____	_____
5. Selected desired document from index -	_____	_____
6. Manipulated keys, levers, and switches to retrieve desired document -	_____	_____
7. Distributed information to persons requesting the data -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:	**Resources:**
system disk; archive disk; storage disk	See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students the system used for identifying documents.	1. Read section in reference manual on document filing, i.e., retrieving.
2. Discuss processing procedure.	2. Following directions enter document I.D. and retrieve document and process as requested by originator.
3. Discuss any questions students may have.	3. Distribute the information.
4. Using reference manual, examine index for list of items available.	
5. Select procedure for retrieving document.	
6. Determine procedure for processing document.	

Duty: Performing Word Processing Skills

Duty No. H

Task No. 14

Task: Maintain records and files using knowledge of records management procedures to purge information.

Achievement Indicators: The learner:	Yes	No
1. Activated the device/system -		
2. Inserted pre-recorded storage media into device -		
3. Retrieved document index -		
4. Read document index -		
5. Selected document to be purged, i.e., delete, copy, move -		
6. Manipulated keys, levers, and switches to purge document, i.e., delete, copy, move -		
7. Unloaded storage media from device -		
8. Unloaded program software from system -		
9. Deactivated the device -		
10. Placed media in designated storage area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual, and established records management procedures.

Tools and Equipment:
system disk; archive disk; storage disk

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with students the system used for identifying document.	1. Read section in reference manual on document filing, i.e., purging (deleting, copying, moving).
2. Discuss processing procedure.	2. Following directions, enter document I.D. and execute purging command.
3. Discuss any questions students may have.	3. Process as requested by originator.
4. Using the reference manual, examine index for list of items available.	4. Check disk to make sure command has been executed.
5. Select procedure to be used for purging document.	5. Place media in designated storage area.
6. Determine procedure for processing document.	

Duty: Performing Word Processing Skills

Duty No. H

Task No. 15

Task: Maintain records and logs using knowledge of records management procedures to produce production reports.

Achievement Indicators: The learner:

	Yes	No
1. Activated the device/system -	____	____
2. Loaded production reporting software into device -	____	____
3. Selected desired production reporting function, i.e., print records by operator, department, author, etc. -	____	____
4. Manipulated keys, levers, and switches to generate reports -	____	____
5. Unloaded production reporting software from system -	____	____
6. Unloaded program software from device -	____	____
7. Deactivated the device -	____	____
8. Placed media in designated storage area -	____	____
9. Distributed production reports -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, operator's manual and established records management procedures.

Tools and Equipment:
word processor; system software; program disk

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review with the students the format to be followed for report production: top, bottom, and side margins, page numbering, spacing, paper length.	1. Read section in reference manual on basic print selections.
2. Discuss any questions students may have.	2. Make correct format decisions for report as instructed.
3. Give overview of correct format for reports.	3. Have first copy checked by instructor before resuming order.
4. Have students read section in reference manual on printing reports.	4. Generate reports as requested by originator.
5. Post a sample of correct format for reports for reference.	5. Store media and distribute reports.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 16

Task: Maintain records and logs using knowledge of records management procedures to control work flow.

Achievement Indicators: The learner:

	Yes	No
1. Reviewed company procedures for work flow management -	____	____
2. Reviewed present work flow procedure -	____	____
3. Selected proper work flow log, i.e., turnaround form document analysis form -	____	____
4. Logged proper information i.e., author, method of input, document category, time in, time out, etc. on work flow log -	____	____
5. Filed work flow log in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards and established work flow records management procedures.

Tools and Equipment:
work flow log sheets

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review company procedures for work flow management.	1. Examine document to determine which work flow log is needed.
2. Review present work flow procedure.	2. Select proper work flow log and log information in each section.
3. Discuss any questions students may have.	3. Have work flow logs checked by instructor before filing.
4. Show students how each work flow log is titled.	4. File work log.
5. Stress importance of completing each section.	
6. Give samples of correctly completed work flow log.	

Duty: Performing Word Processing Skills

Duty No. H

Task No. 17

Task: Maintain records and logs using knowledge of records management procedures and mechanical techniques to provide cost accounting reports.

Achievement Indicators: The learner:	Yes	No
1. Reviewed company procedures for cost accounting reports -	____	____
2. Reviewed the cost accounting procedures -	____	____
3. Retrieved various cost accounting reports from designated individuals -	____	____
4. Selected proper cost accounting format -	____	____
5. Logged required costing information -	____	____
6. Manipulated keys, levers, and switches to perform required calculations -	____	____
7. Recorded calculated information on the cost accounting report -	____	____
8. Filed cost account report in designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, cost accounting procedures, and records management procedures.

Tools and Equipment:
word processor; system software; program disk

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review simple math skills.	1. Do teacher-produced exercises.
2. Review accounts receivable concepts.	2. Do workbook exercises (if available).
3. Explain charge back procedures: a. what is charge back rate? b. why charge back? c. how is charge back rate determined? (1) salary cost (2) equipment cost (3) supply cost (4) overhead cost	3. Implement organization charge back system to be used thereafter.
4. Demonstrate charge back procedures.	
5. Have in-house vendor demonstration.	
6. Take a field trip.	
7. Demonstrate type of charge back payment: a. payment by check b. paper transfer c. electronic transfer	

Duty: Performing Word Processing Skills

Duty No. H

Task No. 18

Task: Trace missing records and file folders using knowledge of the organization, records management procedures, and/or telephone to maintain an accurate and functional filing system.

Achievement indicators: The learner:	Yes	No
1. Reviewed business cross-reference procedures, i.e., system log, index and code documents, etc. -	____	____
2. Determined which records are to be traced -	____	____
3. Read index and/or code sheet to determine location of desired missing records/file folders -	____	____
4. Located missing records -	____	____
5. Updated index and/or code sheet -	____	____
6. Refiled records in properly designated area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to employer's standards, records management procedures, and cross-referencing procedures.

Tools and Equipment:
word processor; system software; program disk

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review alphabetical filing procedures.	1. Complete teacher-produced exercises.
2. Review file/save retrieval procedures.	2. Follow procedure in operating manual for filing, saving, retrieving.
3. Review telephone techniques.	
4. Explain work log entries for job to be done.	
5. Explain work log entries for jobs when completed.	
6. Explain tracing procedure: a. manual trace b. telephone trace c. electronic trace	

Duty: Performimg Word Processing Skills

Duty No. H

Task No. 19

Task: Locate and retrieve information using reference materials and a programmed software package to process a document.

Achievement Indicators: The learner:

	Yes	No
1. Received input document with attached work requisition form -	_____	_____
2. Read work requisition form and input document to determine originator's needs -	_____	_____
3. Checked storage media logs to identify the proper storage media -	_____	_____
4. Manipulated the proper keys, switches, or levers to load the storage media into activated system -	_____	_____
5. Located proper storage media from which to recall specific documents -	_____	_____
6. Checked information to verify that the proper document had been retrieved -	_____	_____
7. Printed the proper document and returned to author -	_____	_____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual and established standards.

Tools and Equipment:
word processing equipment; electronic typewriter; log sheet

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the procedures to activate the word processor. 2. Review location of media logs. 3. Review location of storage media as indicated by the log. 4. Review procedures to locate a stored document. 5. Prepare work requisitions for job exercises. 6. Prepare diskette documents for retrieval. 7. Give work requisitions to students to locate and print documents requested. 8. Demonstrate how to retrieve the first requisition item and print the document. 9. Check exercises and review any errors with student learners.	1. View demonstration on how to read a work requisition. 2. Review operations manual on how to activate the system. 3. Using work requisitions, retrieve and print requested documents. 4. Submit exercises for evaluation.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 20

Task: Select blocks of information using text editing techniques to prepare a new printed document.

Achievement Indicators: The learner:

The learner:	Yes	No
1. Manipulated keys, switches, or levers to locate desired blocks of information -	____	____
2. Manipulated keys, switches, or levers to select the desired blocks of information -	____	____
3. Checked the work requisition with the selected blocks to verify that the proper blocks of information had been selected -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to the operator's manual and established standards.

Tools and Equipment:
word processing equipment; electronic typewriter; log sheet

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review the advantages of editing through the use of a word processor. 2. Review procedures for adding, deleting, or changing a line, word, or character. 3. Review form letters and pre-prepared paragraphs. 4. Discuss coding procedures for retrieval of stored blocks of information. 5. Select exercises using coded paragraphs for form letters. 6. Indicate variables needed. 7. Review criteria for evaluation. 8. Check exercises for consistency, grammar, proper sequence, and accuracy of form.	1. Review coding procedures with the instructor. 2. Review editing procedures for equipment available. 3. Using appropriate exercises, retrieve coded material and print documents with selected variables in the appropriate place. 4. Submit proofread documents to instructor for evaluation. Must be 100% accurate.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 21

Task: Assemble information from any media using keyboard techniques to create a new printed document.

Achievement Indicators:

The learner:	Yes	No
1. Manipulated keys, levers, or switches to name the new document -	____	____
2. Manipulated keys, switches, or levers to create information for a new document -	____	____
3. Manipulated keys, switches, or levers to print the newly created document -	____	____
4. Logged newly created document on storage media log -	____	____
5. Distributed printed document to proper originator -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established procedures, and established records management and document distribution procedures.

Tools and Equipment:
word processing equipment; electronic typewriter; input document/transcriber; log sheet

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review input media, document formats, and machine procedures.	1. Review basic input forms for creating a new document.
2. Discuss editing procedures, grammar alertness, work request forms, and proofreading procedures - manual and mechanical (spelling task).	2. Review work requisition for appropriate format, grammar, and forms required.
3. Demonstrate how to assemble material needed to create a new document.	3. Secure exercise from instructor and review any questions that may be appropriate.
4. Review how to read a work request form.	4. Create appropriate documents according to author's instructions.
5. Review possible grammar errors.	5. Proofread document and submit to instructor for evaluation.
6. Review how to use the spelling tasks if machine has the capacity.	6. Work must be 100% accurate.
7. Present exercises for the lesson.	
8. Proofread completed exercise for 100% accuracy.	
9. Review any errors with student learners.	

Duty: Performing Word Processing Skills

Duty No. H

Task No. 22

Task: Originate forms using word processing software/hardware to meet requester's needs.

Achievement Indicators: The learner:	Yes	No
1. Manipulated keys, levers, or switches to activate the word processor -	____	____
2. Read work requisition form and input document to determine originator's needs -	____	____
3. Inserted storage media into activated system -	____	____
4. Manipulated keys, levers, or switches to name the new form -	____	____
5. Manipulated keys, levers, or switches to identify the designated fill-in areas -	____	____
6. Manipulated keys, levers, or switches to store the newly created form on the media -	____	____
7. Logged newly created form on storage media log -	____	____
8. Manipulated keys, levers, or switches to print a copy of the newly created form -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual and established procedures and guidelines.

Tools and Equipment:
word processor; program diskette; student diskette; source document

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test on achievement indicators. 2. Discuss results of pre-test. 3. Review with the students the advantage of the use of the word processor to develop document which are similar in format. 4. Answer questions students may have on assigned material from operator's manual. 5. Answer questions students may have on operating functions of word processor. 6. Visit the central office and compile a list of documents that are sent to individuals that are similar in format. 7. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material from operator's manual. 3. Complete one of the following activities: a. receive incoming work from central office and read work requisition, identify format needed and read assigned material to produce a shell document to meet the needs of the requisition. b. compose a form letter inviting advisory committee members to a meeting, input as a shell document and enter the appropriate date, address, and salutation and print an envelope. c. enter information from curriculum sheets to up-date tasks for the program. 4. Evaluate finished product with a teacher-made checklist. 5. Submit original source document, finished copy, and teacher-made checklist for approval.

Duty: Performing Word Processing Skills	**Duty No.** H **Task No.** 23

Task: Program forms using word processing software/hardware to fill-in the pre-printed forms.

Achievement Indicators: The learner:

	Yes	No
1. Read work requisition form to identify fill-in information -		
2. Manipulated the keys, levers or switches to name the fill-in information -		
3. Manipulated the keyboard to type the fill-in information -		
4. Manipulated the keys, levers, or switches to store the keyboarded fill-in information onto the storage media -		
5. Manipulated the keys, levers, or switches to fill-in the pre-stored designated fill-in information -		
6. Manipulated the keys, levers or switches to store the completed form on the storage media -		
7. Manipulated the keys, levers or switches to print newly created form -		
8. Logged newly created form on storage media log -		
9. Proofread newly created form -		
10. Distributed printed form to proper originator -		

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual established guidelines and established records management and document distribution procedures.

Tools and Equipment: word processor; program diskette; student diskette; pre-printed form	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer pre-test on achievement indicators. 2. Discuss results of pre-test. 3. Review with students the advantage of the use of the word processor to develop documents which are similar in format. 4. Answer questions students may have on assigned material from operator's manual. 5. Explain the difference to the students between generating a form which is to be printed on pre-printed forms rather than plain paper. 6. Demonstrate the use of a line meter and the operating functions to name, input, end, and recall a shell document for testing and to print on a pre-printed form. 7. Answer questions students may have on operating functions of word processor. 8. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material from operator's manual. 3. Complete one of the following activities: a. receive incoming work from central office and read work requisition, identify format needed and read assigned material to produce a shell document to meet the needs of the requisition. b. form a shell document to enter variable information to prepare report cards for instructors to enter evaluation grades. c. format a shell document to enter variable information to prepare training agreements for the placement office. 4. Evaluate finished product with a teacher-made checklist. 5. Submit original source document, finished copy, and teacher-made checklist for approval.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 24

Task: Program document formats using word processing software/hardware to develop a new printed document.

Achievement Indicators: The learner:

	Yes	No
1. Read work requisition form to identify desired document formats -	____	____
2. Manipulated keys, levers, or switches to name desired document format -	____	____
3. Manipulated keys, levers, or switches to create new desired document format including margins, tabs, line size, page size, vertical and horizontal pitch, etc. -	____	____
4. Manipulated keys, levers, or switches to store the newly created document format on the storage media -	____	____
5. Logged newly created document format on the storage media log -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to oeprator's manual, established guidelines, and established records management procedures and output specifications.

Tools and Equipment:
word processor; program diskette; student diskette; letterhead paper; post cards

Resources:
See Bibliography.

Teacher Activities

1. Prepare and administer pre-test on achievement indicators.
2. Discuss results of pre-test.
3. Review with students the advantage of the word processor to set up a pre-determined format and utilize this format to produce several documents or to change left/right margins and top/bottom margins to change the format of the stored document.
4. Explain to the student the variables that can be utilized on the word processor:
    a. margins
    b. tabs
    c. paper size
    d. 10/12 pitch
    e. single/double spacing
    f. justified margins
5. Answer questions students may have on assigned material from operator's manual.
6. Demonstrate to students how to adjust the following:
    a. margins
    b. tabs
    c. paper size
    d. 10/12 pitch
    e. single/double spacing
    f. justified margins
7. Answer questions students may have on operating functions of word processor.
8. Administer post-test on achievement indicators.

Student Learning Activities

1. Take a pre-test.
2. Read assigned material from operator's manual.
3. Complete one of the following activities:
    a. receive incoming work from central office and read work requisition, identify format needed and read assigned material to produce the document to meet the requirements of the requisition.
    b. type a block letter to be printed on standard 8½" x 11" letterhead paper. Print one copy and then change formatting to print same letter on executive, government, and legal letterhead paper.
    c. type a 2-page unbound manuscript. print one copy and then change formatting to print same manuscript as a left-bound manuscript.
    d. type a post card with a 10 pitch element. Print one copy and then make revisions which will cause the post card to be too long to fit on the card by using a 10 pitch element. Make necessary adjustments to change to a 12 pitch element.
4. Evaluate finished product with a teacher-made checklist.
5. Submit original source document, finished copy, and teacher-made checklist for approval.
6. Take a post-test.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 25

Task: Process management records using word processing software to generate production information.

Achievement Indicators: The learner:

	Yes	No
1. Selected proper records management and production summary forms -	____	____
2. Manipulated keys, levers, or switches to produce indexes/directories and/or production reports -	____	____
3. Manually logged production statistics and/or records management statistics -	____	____
4. Manipulated keys, levers, or switches to remove storage media from system -	____	____
5. Filed storage media in designated storage area -	____	____
6. Manipulated keys, levers, or switches to deactivate the word processor -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established records management procedures and established production procedures.

Tools and Equipment:
word processor; program diskette; student diskette

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Prepare and administer a pre-test on achievement indicators. 2. Discuss results of pre-test. 3. Review with students the importance of records management. 4. Answer questions students may have on assigned material in operator's manual. 5. Demonstrate to students the operating functions to request to print the directory of their student diskette. 6. Explain to students that the printed directory should be stored in pocket on diskette envelope for quick access to file. 7. Answer questions students may have on operating functions of word processor. 8. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material from operator's manual. 3. Enter student diskette and request to print two copies of the directory. 4. Insert one copy of directory into pocket on diskette envelope and file in proper storage area. 5. Submit one copy of directory for approval and filing. 6. Take a post-test.

Duty: Performing Word Processing Skills	**Duty No.** H **Task No.** 26

Task: Sort information using programmed software to sequence records within a stored file.

Achievement Indicators: The learner:	Yes	No
1. Read work requisition form and originator's document -	____	____
2. Selected proper system software -	____	____
3. Manipulated keys, levers, or switches to load the proper system software -	____	____
4. Checked operator messages, lights, sounds etc., to insure that the software was properly loaded -	____	____
5. Inserted storage media -	____	____
6. Created a merge document -	____	____
7. Manipulated keys, levers, or switches to store newly created merge document -	____	____
8. Created the fill-in merge document -	____	____
9. Manipulated keys, levers, or switches to store newly created fill-in merge document -	____	____
10. Manipulated keys, levers, or switches to define and sort criteria for fill-in information -	____	____
11. Manipulated keys, levers, or switches to initiate the sort activity -	____	____
12. Checked that the sorted records were stored -	____	____
13. Verified proper executiion of sort procedure -	____	____
14. Logged the merge document and fill-in document on the records management log -	____	____
15. Proofread both documents -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operations manual and estalished guidelines.

Tools and Equipment:	**Resources:**
activated word processor; storage media; merge and sort/select; system software	See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss with students the need for various sorts of records that are used in the school system and information that is needed to be compiled on records, i.e., report cards, student information cards, medical record cards. 2. Administer pre-test on achievement indicators. 3. Discuss pre-test. 4. Review with students how to enter information in a set format. 5. Demonstrate to students how to name document for each person added to diskette. 6. Demonstrate to students how to recall each person's name to verify information. 7. Demonstrate to students how to log diskette for easy access at a later date. 8. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material from operator's manual. 3. Complete one of the following projects: a. enter names of students on pre-printed report card forms b. enter names and addresses of students in a certain grade (9-12). c. enter names of students and classification of program that they are enrolled in. d. enter names of students and job goal they have chosen. e. enter names of students and year they will graduate. 4. Verify all information by recalling to the screen and check for errors. 5. Print-out list for requesting personnel. 6. Take a post-test.

Duty: Performing Word Processing Skills	**Duty No.** H
	Task No. 27

Task: Select information using programmed software to retrieve specific records from a stored file.

Achievement Indicators: The learner:	Yes	No
1. Read work requisition form and originator's document -	____	____
2. Selected proper system software -	____	____
3. Manipulated keys, levers, or switches to load the proper system software -	____	____
4. Checked operator messages, lights, sounds, etc. to insure that the software was properly loaded -	____	____
5. Inserted storage media -	____	____
6. Created a merge document -	____	____
7. Manipulated keys, levers, or switches to store newly created merge document -	____	____
8. Created the fill-in merge document -	____	____
9. Manipulated keys, levers, or switches to store newly created, fill-in merge document -	____	____
10. Manipulated keys, levers, or switches to define selection criteria for fill-in information -	____	____
11. Manipulated keys, levers, or switches to initiate the selection activity -	____	____
12. Checked that the selected records were stored -	____	____
13. Verified proper execution of selection procedure -	____	____
14. Logged the merge document and fill-in document on the records management log -	____	____
15. Proofread both documents -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operations manual and established guidelines.

Tools and Equipment: activated word processor; storage media; merge and sort/select; system software	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss with students the need to sort records to obtain information for a certain purpose or prepare forms to be mailed out for a specific purpose, i.e., report cards for all students, class lists for teachers at the beginning of the year/semester, grade level lists, male/female lists, etc. 2. Administer pre-test on achievement indicators. 3. Discuss a pre-test. 4. Review the process of finding certain documents on a diskette. 5. Demonstrate to the students the process to load the program and activate the sort/select function. 6. Demonstrate to the students how to verify soft copy for accuracy of list. 7. Demonstrate to the students how to print-out hard copy. 8. Demonstrate to the students how to store list for future use. 9. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material in operator's manual. 3. Complete one of the following projects: a. recall names of students in each grade level. b. recall names and addresses of students in each grade level. c. recall names and classification of students by program. d. recall names of students by job goal. e. recall names of students by year they will graduate. 4. Verify list by checking for accuracy. 5. Print hard copy of list for requesting personnel. 6. Store list for future access. 7. Take a post-test.

Duty: Performing Word Processing Skills

Duty No. H

Task No. 28

Task: Manipulate files using keyboard commands to merge stored information from any file(s) into another file.

Achievement Indicators: The learner:	Yes	No
1. Manipulated keys, levers, and switches to initiate merging activity -	____	____
2. Stored the filled-in documents on storage media -	____	____
3. Manipulated keys, levers, and switches to print the merged documents -	____	____
4. Logged printed merged documents on the records management forms -	____	____
5. Manipulated keys, levers, and switches to remove storage media from system -	____	____
6. Filed storage media in designated storage area -	____	____
7. Manipulated keys, levers, and switches to deactivate the word processing system -	____	____
8. Distributed printed merged documents to proper originator -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operations manual, established guidelines, and established records management procedures.

Tools and Equipment:	**Resources:**
activated word processor; storage media; merge and sort/select; system software	See Bibliography.

Teacher Activities	**Student Learning Activities**
1. Discuss with students the need to sort records and add information to the records to up-date the information contained there. Name several types of forms that concern them that must be up-dated and changed periodically, i.e., report cards, class lists, grade level lists, etc. 2. Administer pre-test on achievement indicators. 3. Discuss pre-test. 4. Review the process of finding certain documents on a diskette. 5. Demonstrate to the students the process to load the program and activate the sort/select function. 6. Demonstrate to the students how to add information to the existing records to up-date. 7. Demonstrate to the students how to verify soft copy for accuracy of list. 8. Demonstrate to the students how to print-out hard copy. 9. Demonstrate to the students how to store list for future use. 10. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material in operator's manual. 3. Complete one of the following projects: a. recall names of students in each grade level and add names of new students to each list. b. recall names and addresses of students in each grade level and add/delete information requested. c. recall names and classification of students by program and add/delete information requested. d. recall names of students by job goal and add/delete information requested. e. recall names of students by year they will graduate and add to list. 4. Verify list by checking for accuracy. 5. Print hard copy of list for requesting personnel. 6. Store up-dated list for future access. 7. Take a post-test.

Duty: Performing Word Processing Skills	**Duty No.** H
	Task No. 29

Task: Perform mathematicl calculations using keyboard and programmed software to verify document information.

Achievement Indicators: The learner:

	Yes	No
1. Read the work requisition form and originator's document -		
2. Selected the proper system software -		
3. Manipulated keys, levers, and switches to load the proper system software -		
4. Inserted storage media -		
5. Manipulated keys, levers, and switches to retrieve prestored statistical document -		
6. Manipulated keys, levers, and switches to define the calculation criteria -		
7. Manipulated keys, levers, and switches to initiate the mathematical formula -		
8. Checked to insure that the calculation procedure had been performed properly -		
9. Manipulated keys, levers, and switches to store the calculated document on the storage media -		
10. Manipulated keys, levers, and switches to print a copy of the calculated document -		
11. Logged calculated document on records management log -		
12. Distributed printed calculated document to proper originator -		
13. Manipulated keys, levers, and switches to remove system math software and storage media from the system -		
14. Filed software and storage media in designated storage area -		

Criteria:	Competence in the task will be recognized when the procedure is performed according to operator's manual, established guidelines, and established records management procedures.

Tools and Equipment:	**Resources:**
microcomputer or word processor; program diskette; work diskette	See Bibliograhy.

Teacher Activities	Student Learning Activities
1. Compare to students the time variance between the manual and automative method of completing of project. 2. Administer pre-test on achievement indicators. 3. Discuss pre-test. 4. Identify a programmed diskette. 5. Identify specific program needed to be used. 6. Identify a work diskette. 7. Demonstrate to students procedure to activate program. 8. Demonstrate to students how to search for appropriate documents. 9. Demonstrate to students the procedure to run program. 10. Demonstrate to students how to remove hard copy from printer. 11. Administer post-test on achievement indicators.	1. Take a pre-test. 2. Read assigned material from operator's manual. 3. Complete one of the following projects: a. enter information requested by amortization program. b. enter information requested by evaluation program. c. enter information requested by sales tax program. 4. Insert programmed diskette and load program. 5. Insert work diskette and specify document needed. 6. Retrieve key information to compile data. 7. Dump information to hard copy and submit to requesting personnel. 8. Take a post-test.

Duty: Maintaining Inventory	**Duty No.** I **Task No.** 1

Task: Receive supplies and materials using inventory control forms to maintain recommended inventory levels.

Achievement Indicators: The learner:

	Yes	No
1. Reviewed the company inventory control procedures -	____	____
2. Selected proper inventory control forms -	____	____
3. Verified quantity received -	____	____
4. Recorded receipt of supplies/materials on the inventory control form -	____	____
5. Checked mini/max quantity levels -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory control procedures.

Tools and Equipment: inventory control forms	**Resources:** See Bibliography.

Teacher Activities	Student Learning Activities
1. Provide a sheet with sample situations describing how, as an example. someone keeps track of their grocery supplies at home. Ask questions directly relating to the situation(s) and get feedback from students on what they know and feel about the skill of receiving supplies/materials using inventory control forms.	1. Read from secretarial/clerical text, such as, Office Procedures by McGraw Hill Publishing, section on stock inventory. Do assigned questions.
2. Provide and post examples of materials used in inventory control. Give pretest, if possible, to determine prior knowledge of skill.	2. Complete specific jobs within the Gregg Office Job Training Program for the Stock Control Clerk (by Albertson).
3. Display achievement indicators on poster.	3. Complete assigned task within the classroom, school or in industry. Use achievement indicators on checksheet for feedback and measurement.
4. Demonstrate through the use of your own program's/classroom's materials, how the achievement indicators should be done. Explain each step and tell why they are important to the task.	
5. Divide the class into two groups: one group will check your methods for receiving the supplies/materials according to a checklist you make up. The other group will observe and listen. Then, using different materials for the second group, ask them to reverse places.	

Duty: Maintaining Inventory	**Duty No.** I **Task No.** 2

Task: Sort supplies and materials using inventory control forms to verify receipt and condition of items on requisition and/or purchase order/ invoice.

Achievement Indicators: The learner:	Yes	No
1. Selected the proper inventory control forms -	____	____
2. Opened incoming package -	____	____
3. Checked packing slip with items received and purchase order -	____	____
4. Checked supplies/materials for damaged goods and quantity received -	____	____
5. Recorded condition of goods and quantity received on inventory control form, packing slip and purchase order -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory control procedures.

Tools and Equipment:	**Resources:**
package with items for inventorying; forms used with task: inventory control form, packing slip, purchase order	See Bibliography.

Teacher Activities	Student Learning Activities
1. Show a package which has just been delivered (may want to put a student's name on it). Have a variety of forms -- inventory control form packing slip, purchase order -- visible.	1. Read assigned materials from text.
2. Ask for discussion on how task of examining goods would be done, ask if anyone has had to do this task on a job.	2. Using prepared boxes with items in them, use correct procedures for examining and verifying items.
3. Give pre-test covering achievement indicators.	3. Use checksheet of achievement indicators for evaluation.
4. Using visuals of items required to teach the task and list of achievement indicators, explain process of examining supplies, using forms for verification of condition of goals and quantity. (Go step by step through each indicator.) If slides are available, use them.	4. Arrange for time to be spent within the school's shipping/receiving area or at another business for practice of task on the job.
5. Demonstrate task by leading one student through it so others can see how it is done. Use someone from the shipping and receiving area at your school to demonstrate it.	
6. Give summary of how to perform the task, why it is important to the job.	
7. When appropriate give a post-test.	

Duty: Maintaining Inventory

Duty No. I

Task No. 3

Task: Adjust supplies and materials using inventory control forms to replace damaged or defective supplies and materials.

Achievement Indicators: The learner:

	Yes	No
1. Gathered items damaged or defective -	____	____
2. Called manufacturer to request return authorization number -	____	____
3. Packed damaged merchandise -	____	____
4. Adjusted inventory -	____	____
5. Shipped damaged merchandise to manufacturer -	____	____
6. Submitted return form to accounting department -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory control procedures.

Tools and Equipment:
materials/forms for doing task: damage/defective items, shipping labels, packing slip or invoice or p.o., return form

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Use a technique(s) to get at what the students' previous or existing experience is with this task. 2. Ask if any of them have ever ordered anything through the mail -- if so, did they ever receive damaged merchandise? What did they do with it, if so? Relate that kind of experience with what takes place in this task. 3. Administer a pre-test. 4. Tell why or principle of this task: if you know how to adjust supplies and materials by using inventory control forms to replace damaged or defective supplies/materials, then you will be following procedures so that stock records are kept current. 5. Using strips of cardboard with the achievement indicators on them, place the indicators, one at a time, in front of the students. As you do that, show either pictures or actual examples of how each step is to be done. Explain as you show the actual achievement indicators and pictures or products, how and why each has to be done in order to achieve the task of adjusting supplies and inventory supplies. 6. Assign exercises. 7. Summarize and review activity the students have performed. 8. Give a post-test.	1. Read from textbooks dealing with adjusting supplies and materials using inventory control forms. Answer textbook questions at end of reading assignment. Submit work for evaluation or progress. 2. Get into small working groups of perhaps 4-5 per group. Using a package with damaged goods in it complete the task. Identify in writing what each member accomplished.

Duty: Maintaining Inventory

Duty No. I

Task No. 4

Task: Store supplies and materials using inventory storage forms to maintain recommended inventory levels.

Achievement Indicators: The learner:	Yes	No
1. Gathered appropriate forms and materials -	____	____
2. Selected proper storage area -	____	____
3. Placed supplies/materials in designated storage area -	____	____
4. Recorded inventory change on inventory control form -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory storage procedures.

Tools and Equipment:
inventory control form

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. In reviewing, try to find out about related knowledge of task.	1. Complete inventory storage forms for practice until mailable copy is produced.
2. You may want to write or verbally describe a couple of situations where stocking supplies has been done -- one correctly using storage forms and another not using any system or part of a system.	2. Manage classroom supplies for 2 weeks and decide where calssroom supplies shall be placed.
3. Administer a pre-test.	3. Record during this two-week period, any inventory changes on the inventory control form.
4. Show achievement indicators on overhead transparency, chalkboard or in handout form.	4. Serve a one-week internship in the school's main office, maintaining office supplies and materials and completing the paper work.
5. Using supplies and materials within the classroom itself, tell how you would accomplish this task so that you always have an appropriate inventory level.	
6. Demonstrate the task indicators by going through all steps to achieve it using classroom supplies, cabinets, etc.	
7. Assign student exercises. One possibility would be for the teacher to prepare an activity sheet with a checklist of key points discussed, as well as the evaluation method which will be used. The activity sheet could describe a situation which requires that stock be stored. Instruct students on the proper method of completing inventory storage forms. Discuss case studies relative to maintaining stock so students can intelligently arrive at appropriate decisions given a set of prescribed circumstances.	
8. Take students back over the task by summarizing what the task entailed, why it is important and how it may be done.	
9. Give a post-test.	

Duty: Maintaining Inventory

Duty No. I

Task No. 5

Task: Issue supplies and materials using knowledge of stockroom inventory and appropriate forms to fill requisition orders.

Achievement Indicators: The learner:	Yes	No
1. Gathered supply requisition forms -	____	____
2. Determined the appropriate supplies/materials for designated individual/department -	____	____
3. Distributed supplies/materials to the designated individual/department -	____	____
4. Recorded inventory change on inventory control form -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:
requisition forms; inventory control forms; receipt for goods dispersed

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review purpose of the task.	1. Get into triads: (1) one of you will be a monitor and will use checklist to evaluate task (2) one of you will be person requesting supplies; (3) one of you will be person issuing supplies. Rotate roles so that all of you get to issue supplies. Turn in evaluation form which may be in checksheet format.
2. Explain to students that if they can apply their knowledge of stockroom inventory, then they can issue supplies/materials so that requisition orders can be filled.	2. Perform the task for a designated period of time in your classroom, in another teacher's classroom) or in school office. Either report back to class verbally or write report on the experience.
3. Set up area of classroom to visually show students. Tell students to take notes/write achievement indicators as you give them.	3. Complete a post-test.
4. Demonstrate process for how one would issue supplies and materials using knowledge of stockroom inventory and appropriate forms to fill requisition orders.	
5. Assign student exercises. Prepare instruction and activity packet: gather the supply requisition forms - to make decisions on what supplies/materials go to what individuals or departments; to describe procedures for distributing supplies/materials; to record inventory change on inventory control forms. Include in packet how students will be graded on the activity.	
6. Summarize what the students now know about the task, why it is to be done and how it is accomplished.	
7. Administer a post-test.	

Duty: Maintaining Inventory

Duty No. I

Task No. 6

Task: Order supplies and materials using inventory control procedures and appropriate forms to maintain recommended inventory levels.

Achievement Indicators: The learner:

	Yes	No
1. Gathered appropriate ordering forms -	____	____
2. Determined quantities and items to be ordered from the mini/maxi order schedule -	____	____
3. Completed order form -	____	____
4. Submitted order form to Accounts Payable department -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to internal purchasing procedures.

Tools and Equipment:
requisition and/or purchase order; mini-maxi quantity level guidelines

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask students if they have ever ordered clothing from a catalog. Discuss what they had to know to be able to do that. How did they feel the first time they did it? Did it get easier? If any had ordered supplies in a job situation, ask them to tell what they had to do. 2. Discuss the desirability of completing appropriate paper work in order to maintain the necessary supplies (recommended inventory levels). 3. Explain and show the achievement indicators for this task. 4. Tell how one may determine quantities and items needed to be ordered. Show mini-max order schedule and explain it. Demonstrate how to complete order forms and how to submit it to Accounts Payable. 5. Assign student exercises. One possibility is to utilize simulated exercises requiring the students to complete order forms. You could create an activity sheet which indicates instructions for ordering supplies, utilizing a teacher-developed "mini-maxi," schedule requiring students to complete an order form. 6. Summarize why this task is part of their job and how it is achieved. 7. Give a post-test.	1. Complete learning activity sheet. 2. Role-play the Accounts Payable Department and pretend to have received several order forms to process. 3. Discuss and scrutinize each order form and indicate reasons why the form was/was not properly completed. 4. Evaluate each order form and submit these forms to the teacher upon completion of the activity.

Duty: Maintaining Inventory

Duty No. I

Task No. 7

Task: Distribute supplies and materials using mechanical equipment or manual techniques to provide workers with supplies and materials.

Achievement Indicators: The learner:	Yes	No
1. Gathered supplies/materials requisition forms -	____	____
2. Determined the appropriate supplies/materials for designated individual/department -	____	____
3. Obtained moving device -	____	____
4. Loaded supplies/materials onto device -	____	____
5. Manipulated keys, levers, switches to activate the device -	____	____
6. Distributed supplies/materials to the designated individuals/departments -	____	____
7. Recorded inventory change on inventory control form -	____	____
8. Manipulated keys, levers, switches to deactivate device -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established procedures.

Tools and Equipment:	**Resources:**
moving device for transporting inventory; requisition forms; inventory control form; inventory record	See Bibliography.

Teacher Activities	Student Learning Activities
1. Write description of two situations: (a) an office worker tries to distribute supplies/materials without aid of mechanical equipment or manual techniques; (b) an office worker uses appropriate techniques and equipment to distribute materials/supplies. Ask students to respond to series of questions about situations. Ask for their own experiences in getting materials or supplies in stores for own use. 2. Give a pre-test if appropriate. 3. Show pictures or slides of steps one would go through to achieve the indicators and tell how each is to be done. 4. If there is a mechanical device in the school for moving supplies, show it and tell how to use it. 5. Demonstrate process by looking at a requisition form requesting supplies you already have on hand in class. Tell class what it says or show it on overhead; then, tell how to move material in best way if no device is available. 6. Assign student exercises by distributing student activity sheets which are designed for task practice. Be sure to include the inventory control form onto the student activity sheet and instruct the student to record appropriate inventory changes. Attach a checksheet so students know how they are being evaluated. 7. Ask a local industry to loan the school equipment for moving and distributing equipment/materials. Create a checksheet using the operation manual to list proper moving techniques which should be employed. 8. Summarize achievement indicators for this task and tell how it relates to rest of job requirements. 9. Administer a post-test.	1. Complete student activity sheet for practice exercise. 2. Fill out the answer sheet attached to the student activity sheet and submit activity and answer sheets to the teacher for evaluation critique. 3. Perform the school's shipping and receiving job, if practical; performance will be evaluated by the same checksheet distributed above. 4. Demonstrate how to use "transport" equipment borrowed from a local business. 5. Complete a post-test.

Duty: Maintaining Inventory

Duty No. I

Task No. 8

Task: Mark supplies and materials using inventory labels or markers to identify supplies and materials.

Achievement Indicators: The learner:

	Yes	No
1. Gathered appropriate supplies and forms -	____	____
2. Marked stock items according to:		
a. location -	____	____
b. description/code -	____	____
c. other required information -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory control procedures.

Tools and Equipment:
supplies/materials for inventory; perpetual inventory control forms; goods received forms

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask students if any of them have ever marked supplies and what they had to do to do it. If no one has ever done that, ask for description of how a library keeps track of what it has and how books are marked. 2. Administer a pre-test, if appropriate. 3. Demonstrate the task by making transparencies from the forms you will use in teaching the task. Then, have supplies and materials on hand which you can mark with location, description/code and other information which might be needed. Explain as you demonstrate, that by marking the supplies/materials students will be able to easily identify needed information. Use markers on some of the materials and use labels on others. Discuss when use of one might be more appropriate than other. 4. Create a list of questions from class discussion topics relative to gathering supplies and marking stock items and instruct students to complete and submit. 5. Write local businesses requesting their policy on marking stock items. 6. Request permission from the main office for student internships in the main office, counseling office, or placement office. 7. Assign student exercises. 8. Summarize purpose of doing this task and review achievement indicators. 9. Administer a post-test when appropriate.	1. Answer questions comprised of class discussion topics relative to procedures utilized in performing this task. 2. Read assigned textbook pages relative to performing this task. 3. Read local business policies on marking materials and supplies for accurate "inventory keeping." 4. Complete teacher-made simulation: View pictures of supplies and materials and mark items according to criteria established during the class discussion. 5. Serve a one-week internship in the school's main office, counseling office, or placement office and appropriately label for inventory purposes supplies and materials. 6. Complete a post-test.

Duty: Maintaining Inventory

Duty No. I

Task No. 9

Task: Measure supplies and materials using inventory control forms and measurement devices to verify conformance of items on requisition and/or purchase order/invoice to specifications.

Achievement Indicators: The learner:	Yes	No
1. Selected items to be measured -	____	____
2. Gathered appropriate supplies and forms -	____	____
3. Measured items -	____	____
4. Verified measurement conformance of items with specifications -	____	____
5. Recorded conformance and/or deviations on appropriate forms -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory control procedures.

Tools and Equipment:
measurement device(s);
inventory control forms;
requisition and/or purchase order/invoice

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Ask students to share any experiences they have had in measuring supplies/materials which they have received at home or on a job. 2. Give examples of situations where this might take place. Have students respond verbally or in writing as to how they would answer questions you pose about the situations. Discuss as group. 3. Give a pre-test if appropriate. 4. Tell why task is important. State that if you can measure supplies and materials by using inventory control forms and measurement devices, then you can verify conformance of the items on the requisition and/or purchase order/invoice to specifications so that accuracy can be maintained. 5. Select items which may be used to demonstrate how measurement can be done. Tell how it is done and show forms used with the task. 6. Demonstrate measurement of items and devices for measuring. Explain how verified measurement is done. 7. Show appropriate forms on which conformance or deviation is to be recorded. Tell how to record information and using transparency of form(s), demonstrate recording information. Demonstrate both conformance and deviation. 8. Assign student exercises. Give students assignment sheets with instructions on gathering supplies and forms and measuring items described. 9. Summarize the task indicators; review importance of task (principle). 10. Administer a post-test.	1. Answer questions regarding the measurement of supplies/materials and submit answers for evaluation Example: what are common measurement devices? 2. While working in pairs, complete a teacher made activity sheet which will instruct to select certain items to be measured, actually measure those items and determine if the item conforms to requisition purchase order, or invoice specifications. This activity will be done in front of all the class while the teacher evaluates each group individually and discusses strengths and weaknesses of each group. 3. Complete a post-test when appropriate.

Duty: Maintaining Inventory

Duty No. I

Task No. 10

Task: Count supplies and materials using inventory control forms to verify receipt of items on requisition and/or purchase order/invoice.

Achievement Indicators: The learner:	Yes	No
1. Gathered appropriate supplies and forms -	____	____
2. Listed items to be counted -	____	____
3. Counted total of one item -	____	____
4. Recorded total on inventory worksheet -	____	____
5. Repeated steps three and four for remaining items -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to established inventory control procedures.

Tools and Equipment:
inventory supplies; inventory control forms; inventory worksheet

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Read a couple descriptions (teacher-made) of how two different office people kept track of what they ordered and what they received. (One should be based on achievement indicators for task -- the other should be an illogical description of what a person might do.) 2. Give out response sheets and have students answer which case best describes procedures which should be followed. Ask them to write how they would correct the situation in the case where the task was done incorrectly. 3. Give a pre-test. 4. Show overhead transparency of either requisition or purchase order, invoice, requesting 2-3 items (which you have already received). Go over the form and explain that you want to verify that the items you have just received are of the same number shown on the form. 5. Demonstrate by counting the 2-3 items and explain how to record the total on the inventory worksheet. 6. Assign student exercises. Make up a packet of requisitions, purchase orders and invoices. Give student an information sheet which tells them about the items that are on hand and about counting supplies and materials. Instruct them to verify that all items were received, as shown on the forms. Indicate how evaluation will take place. Contact businesses for students to visit. 7. Summarize the achievement indicators for this task of counting supplies/materials using inventory control forms to verify receipt of items on requisition and/or purchase order/invoice. 8. Give a post-test.	1. Perform the task by using supplies/materials within the classroom according to evaluation techniques discussed with the class. 2. Visit a local business and perform this task. Secure a written task evaluation done by the supervisor. 3. Write paragraph about process for doing task and how it differed from other times. 4. Complete a post-test.

Duty: Maintaining Machines and Office Equipment

Duty No. J

Task No. 1

Task: Perform equipment maintenance functions using appropriate materials to maintain systems operations.

Achievement Indicators: The learner:

	Yes	No
1. Read the manufacturer's list of routine maintenance activities to insure efficient operation -		
2. Determined which maintenance function must be completed (ribbon change, element change, etc.) -		
3. Selected proper supplies and/or tools to perform the maintenance activity -		
4. Manipulated keys, levers, and switches to complete the proper maintenance activities -		
5. Returned supplies and/or tools to designated storage area -		
6. Cleaned storage area -		

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's/instructions manual, established guidelines and manufacturer's specifications.

Tools and Equipment:
related office equipment and appropriate cleaning tools and materials

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Discuss why machine maintenance is important.	1. Read related manufacturer's materials.
2. Discuss when you should perform maintenance functions on related equipment.	2. Model teacher in maintenance functions.
3. Demonstrate how to maintain a piece of equipment with appropriate tools and/or materials. Have students model you.	3. Participate in routine maintenance tasks and checks.
4. Check to see if students were able to perform function(s) correctly. Assist and/or correct when necessary.	4. Complete a post-test(s).
5. Routinely schedule maintenance functions on equipment. Check students against achievement indicators.	
6. Prepare and administer objective post-test based on procedures manual and/or demonstrating post-test based on achievement indicators.	

Duty: Maintaining Machines and Office Equipment

Duty No. J

Task No. 2

Task: Analyze equipment malfunction using a knowledge of system operations to determine if malfunction can be corrected by the operator or is to be reported to a service firm.

Achievement Indicators:

The learner:	Yes	No
1. Reviewed operational procedures which occurred prior to malfunction -	____	____
2. Checked the operator's messages, lights, sounds, system operations, etc. to determine that there was a malfunction -	____	____
3. Read operator's manual to ascertain what suggested corrective procedure may exist -	____	____
4. Selected proper corrective procedure, if one existed for the defined malfunction -	____	____
5. Reported the malfunction to the service firm, if corrective procedure did not exist -	____	____
6. Logged any action taken on the service log -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established procedures, and manufacturer's specifications.

Tools and Equipment:
equipment manual; appropriate tools

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Teach students to review procedures they performed before malfunction and before consulting instructor.	1. Review the procedures manual for types of malfunctions which may occur.
2. Review the types of problems most likely to occur.	2. Learn where message keys or warning lights are located on equipment.
3. Demonstrate possible malfunctions.	3. View classroom demonstration on how to correct errors.
4. Demonstrate how to use the operator's manual to correct errors.	4. Create a malfunction according to direction given in handout.
5. Show how to read table of contents to locate problem to be checked.	5. Correct malfunction using the operator's manual and perform the steps in proper sequence.
6. Demonstrate the keys used to determine problems or to correct.	
7. Cause lights or signals to come on to show students what they look like or sound like when a malfunction occurs.	
8. Handout exercise sheet.	
9. Have students attempt to first correct their own errors before assisting them.	

Duty: Maintaining Machines and Office Equipment

Duty No. J

Task No. 3

Task: Perform routine equipment maintenance functions using manufacturer's instructions to maintain systems operations.

Achievement Indicators: The learner:

	Yes	No
1. Read manufacturer's list of routine maintenance activities to insure efficient system operation -	____	____
2. Determined which maintenance function must be completed (ribbon change, print wheel, etc.) -	____	____
3. Selected proper supplies and/or tools to perform the maintenance activity -	____	____
4. Manipulated keys, levers, and switches to complete the proper maintenance activities -	____	____
5. Returned supplies and/or tools to designated storage area -	____	____
6. Cleaned work area -	____	____

Criteria: Competence in the task will be recognized when the procedure is performed according to operator's manual, established procedures, and manufacturer's specifications.

Tools and Equipment:
ribbons; print wheel; typing element

Resources:
See Bibliography.

Teacher Activities	Student Learning Activities
1. Review procedures to change ribbon, print element, and clean screen.	1. Read the equipment manual procedures for maintenance.
2. Show overheads of pictures of procedures from equipment manual.	2. List the items an operator must maintain on a regular basis.
3. Distribute teacher prepared listing of steps for procedures.	3. View a demonstration on how to perform routine maintenance on current equipment in the classroom.
4. Demonstrate proper removal of items to be changed.	4. Perform maintenance on equipment when needed.
5. Show students what an item looks like new and one that is damaged or worn out.	5. Report any malfunction that does not respond to operator corrections to instructor.
6. Demonstrate the proper way to replace items.	
7. Show students how to use the equipment manual to replace items, i.e., ribbon, typing element, etc. Display replacement items and their locations.	
8. Have students demonstrate the proper replacement procedures.	

CERTIFICATE OF ACHIEVEMENT

____
(Name of School or Skill Center)

recognizes ______________________________ for completing

instruction in an approved vocational/technical

____ program.
(Name of Program--Steno/Clerical,Legal, Medical)

__________________________________ is capable of performing
(Name of Student)

tasks in the following occupations:

The student's level of achievement is identified by tasks on the Achievement Record.

Number of Course Hours ____ Administrator ____________________ ______
Date

Number of Course Hours
Student Completed ____ Instructor ____________________ ______
Date

Number of Hours
Student Completed in
Co-Op Work Experience
Program ______

This certificate is recommended for Secretarial and Related Occupations (07.0601) Program Graduates statewide.

STUDENT ACHIEVEMENT RECORD

STENO/CLERICAL

STUDENT ____

INSTRUCTIONS:

Mark each student's level of competence according to the following guide:

LEVEL	GUIDE
1	Student has been exposed to task
2	Task accomplished with assistance
3	Task accomplished to criteria by student
4	Ability to teach or demonstrate the task to others

TASK	LEVEL	DATE
A. RECEIVING, INTERVIEWING, AND INFORMING PEOPLE		
1. Receive people.		
2. Collect information to insure completion of documents.		
3. Answer questions to provide information.		
4. Schedule appointments.		
5. Interview people.		
6. Question originator to determine task requirements of originator.		
7. Locate workers to verify workers' attendance on job.		
B. PERFORMING TELEPHONE OPERATIONS		
1. Receive call.		
2. Route calls.		
3. Place call.		
4. Page establishment personnel .		

TASK	LEVEL	DATE
C. PREPARING AND DISTRIBUTING MAIL		
1. Process mail and documents.		
2. Route mail and documents.		
3. Collect mail and documents.		
4. Apply postage.		
D. PERFORMING ACCOUNTING, BANKING, CREDIT, AND PAYROLL FUNCTIONS		
1. Receive cash and checks to accept as a deposit on customer's account or as a payment on a customer's bill.		
2. Cash checks to exchange for cash.		
3. Deposit cash and checks.		
4. Sell money orders, traveler's checks, and savings bonds.		
5. Prepare payroll to provide pay to employees.		
6. Open accounts.		
7. Issue statement to report amount due from customer.		
8. Restrict customer's use of account.		
9. Compute data to determine gross earnings, deductions, and net earnings.		
10. Compute data to determine commissions.		
11. Compute data to determine discounts, payment, credits, and debits.		
12. Compute data to determine interest rates.		
13. Calculate data to determine gross earnings, deductions, and net earnings.		
14. Calculate data to determine commisions.		
15. Calculate data to determine discounts, payments, credits, and debits.		
16. Calculate data to determine interest rates.		

TASK	LEVEL	DATE
E. PREPARING DOCUMENTS, CORRESPONDENCE, AND REPORTS		
1. Format information.		
2. Type information.		
3. Take dictation.		
4. Transcribe materials.		
5. Transcribe dictation.		
6. Examine documents to verify completeness, accuracy, authenticity, and format.		
7. Review documents to incorporate proposed changes.		
8. Scan incoming correspondence.		
9. Review incoming correspondent to formulate reply.		
10. Collate documents to assemble documents in proper sequence (manually).		
11. Collate documents to assemble documents in proper sequence (mechanically).		
12. Staple documents to fasten documents.		
13. Compose correspondence to communicate information to correspondent.		
14. Compose correspondence to request information from correspondent.		
15. Produce documents to communicate information.		
16. Prepare worksheets to communicate information.		
17. Arrange data to organize information in a tabular form.		
18. Categorize data to classify information.		
19. Number documents to sequence pages.		
20. Prioritize jobs to produce documents on a timely basis.		
21. Gather data to compile document information.		
22. Compile reports to provide information.		
F. MAINTAINING FILES, RECORDS, AND LOGS		
1. Maintain records and files to store information.		
2. Maintain records and files to retrieve information.		

TASK	LEVEL	DATE
F. MAINTAINING FILES, RECORDS, AND LOGS (con't)		
3. Maintain records and logs to produce production reports or cost accounting reports.		
4. Maintain records and logs to control work flow.		
G. DUPLICATING AND ASSEMBLING DOCUMENTS		
1. Duplicate documents to reproduce information.		
2. Photograph documents to reproduce documents on microfilm.		
H. PERFORMING WORD PROCESSING SKILLS		
1. Perform magnetic media maintenance routines to maintain file media.		
2. Activate word processor to prepare equipment for processing of information.		
3. Load software to access software functions.		
4. Input information to record documents.		
5. Input information to store documents.		
6. Enter stored media keyboard commands to retrieve/recall text.		
7. Enter instructions to print documents.		
8. Enter stored media to revise text.		
9. Enter stored media to communicate information.		
10. Copy (stored) data to duplicate information from one document to another.		
11. Record information to maintain a record of the information.		
12. Maintain records and files to store information.		
13. Maintain records and files to retrieve information.		
14. Maintain records and files to purge information.		
15. Maintain records and logs to produce production reports.		
16. Maintain records and logs to control work flow.		

TASK	LEVEL	DATE
H. PERFORMING WORD PROCESSING SKILLS (con't)		
17. Maintain records and logs to provide cost accounting reports.		
18. Trace missing records and file folders to maintain an accurate and functional filing system.		
19. Locate and retrieve information to process a document.		
20. Select blocks of information to prepare a new printed document.		
21. Assemble information to create a new printed document.		
22. Originate forms to meet requester's needs.		
23. Program forms to fill-in the pre-printed forms.		
24. Program document formats to develop a new printed document.		
25. Process management records to generate production information.		
26. Sort information to sequence records within a stored file.		
27. Select information to retrieve specific records from a stored file.		
28. Manipulate files to merge stored information from any file(s) into another file.		
29. Perform mathematical calculations to verify document information.		
I. MAINTAINING INVENTORY		
1. Receive supplies and materials to maintain recommended inventory levels.		
2. Sort supplies and materials to verify receipt and condition fo items.		
3. Adjust supplies and materials to replace damaged or defective supplies and materials.		
4. Store supplies and materials to maintain recommended inventory levels.		

TASK	LEVEL	DATE
I. MAINTAINING INVENTORY		
5. Issue supplies and materials to fill requisition orders.		
6. Order supplies and materials to maintain recommended inventory levels.		
7. Distribute supplies and materials to provide workers with supplies and materials.		
8. Mark supplies and materials to identify supplies and materials.		
9. Measure supplies and materials to verify conformance of items on requisition and/or purchase order/invoice to specifications.		
10. Count supplies and materials to verify receipt of items on requisition and/or purchase order/invoice.		
J. MAINTAINING MACHINES AND OFFICE EQUIPMENT		
1. Perform equipment maintenance functions to maintain systems operations.		
2. Analyze equipment malfunction to determine if malfunction can be corrected by the operator or is to be reported to a service firm.		
3. Perform routine equipment maintenance functions to maintain systems operations.		

CLASS ACHIEVEMENT RECORD

NAME TASK No.																																

BUSINESS ASSOCIATIONS

1. American Business Communication Association (ABCA)
Mr. Francis W. Weeks
Executive Director
University of Illinois
English Building
608 South Wright Street
Ubrana, Illinois 61801
(217) 333-1007

2. American Vocational Association (AVA)
Charles Hopkins, President
Membership Depts. AVA
2020 North 14th Street
Arlington, VA 22201

3. American Word Processing Association (AWPA)
P.O. Box 16267
Lansing, Michigan 48901

4. Association of Records Managers and Administrators, Inc.
P.O. Box 281
Bradford, Rhode Island 02808

5. Catholic Business Education Association
c/o Sr. Marian James Deegan
Elizabeth Seton College
1061 North Broadway
Yonkers, New York 10701
(914) 968-5220

6. Common (Data Processing)
435 North Michigan Avenue
Room 1717
Chicago, Illinois 60611
(312) 825-8214

7. Data Processing Management Association
505 Busse Highway
Park Ridge, Illinois 60068
(312) 825-8124

8. Delta Pi Epsilon
(by invitation only)
National Office
Gustavus Adolphus College
St. Peter, Minnesota 56082

9. Foundation for Student Communication
Aron Burr Hall
Princeton University
Princeton, New Jersey 08540
(609) 921-1111

10. International Association of Business Communicators (IABC)
870 Market St., Suite 940
San Francisco, CA 94102
Executive Director: John N. Bailey
(lists Nationwide Job Openings)

11. International Information/Word Processing Association
1015 North York Road
Willow Grove, Pennsylvania 19090
(215) 657-6300

12. International Society for Business Education
U.S. Chapter
1906 Association Drive
Reston, Virginia 22091
(703) 860-0213

13. Marketing And Distributive Education Teachers (MADET)
7878 Brighton Road
Dan Connell, President
Brighton High School
Brighton, MI 48116

14. Medical Group Management Association
4101 East Louisiana Avenue
Denver, Colorado 80222
(303) 753-1111

15. Michigan Association For Computer Users In Learning
Larry Smith, Communications Secretary
Wayne County ISD
P.O. Box 807
Wayne, MI 48184

16. Michigan Association of Teacher Educators for Business (MATEB)
For further information contact the Business Department Chairperson in the university of your choice.

17. Michigan Business Education Association (MBEA)
Eldon Kaufman, President
32633 Gainsborough
Warren, MI 48093

18. Michigan Chapter of the National Association of Medical Staff Services
Ms. Joyce Gardner, President
Medical Staff Services
#1 Hurley Plaza
Flint, Michigan 48502

19. Michigan Occupational Education Association (MOEA)
Mr. David Dvorak, President
Mott Adult High School
923 East Kearsley
Flint, MI 48503

20. National Association of Educational Secretaries
1801 North Moore Street
Arlington, Virginia 22091
(703) 528-4400

21. National Association of Executive Secretaries
9401 Lee Highway, Suite 210
Fairfax, Virginia 22031
(703) 273-2988

22. National Association of Legal Secretaries
3005 East Skelly Drive
Suite 120
Tulsa, Oklahoma 74105

23. National Association of Medical Secretaries
1 East Wacker Drive
Suite 1510
Chicago, Illinois 60601

24. National Association of Business Education State Supervisors
Huland D. Miley, President
Section Chief
Business Education
Louisiana Department of Education
P.O. Box 44064
Baton Rouge, LA 70804

25. National Business Career Center
3339 White Plains Road
New York, New York 10467
(212) 881-0231

26. National Business Education Association
1906 Association Drive
Reston, Virginia 22091
(703) 860-0213

27. National Collegeiate Association for Secretaries
c/o Professor Carolyn Dolecheck
Department of Business Education and Office Administration
Northeast Louisiana University
Monroe, Louisiana 72109
(318) 342-4008

28. Professional Secretaries, International
2440 Pershing Road
Crown Center, Suite G-10
Kansas City, Missouri 64108
(816) 474-5755

29. National Shorthand Reporters Association
118 Park Street, S.E.
Vienna, Virginia 22180
(703)281-4677

30. North Central Business Education Association
All MBEA members are automatic members
President - James Handorf, Illinois
President-elect, Dr. Sue Rigby
Office Administration
Business Education Dept.
Northern Michigan University
Marquette, MI 49855

31. Office Education Association
1120 Morse Road
Columbus, Ohio 43229
(614) 888-5776

32. Society of Certified Data Processors
2670 Union Extd, Suite 532
Memphis, Tennessee 38112
(901) 458-4905

33. Word Processing Society
P.O. Box 92553
Milwaukee, WI 53202

1982-83 MICHIGAN VOCATIONAL EDUCATION ORGANIZATIONS

SECONDARY ORGANIZATIONS	PRESIDENT
Food Service Teachers Group FSTG (517) 279-8081	Elayne Foster Branch Area Career Center 366 Morse Street, Box 509 Coldwater, MI 49036
Marketing and Distributive Education Teachers MADET (313) 229-5000	Dan Connell Brighton High School 7878 Brighton Road Brighton, MI 48116
Michigan Association of Area School Administrators MAASA (517) 773-7961	Dr. Marvin Oberlander Mt. Pleasant Public Schools 1155 South Elizabeth Mt. Pleasant, MI 48858
Michigan Association of Practical Nurse Educators MAPNE (616) 372-5223	Reezie Walraven Kalamazoo Valley Community College 6767 West "O" Street Kalamazoo, MI 49009
Michigan Association of School Placement Personnel MASPP (517) 676-1051	Robert Thelen Ingham Intermediate School District 2630 West Howell Mason, MI 48854
Michigan Association of Teachers of Vocational Agriculture MATVA (517) 279-8081	Charles Snyder 366 Morse Street Coldwater, MI 49036
Michigan Business Education Association MBEA (313) 977-6800	Eldon Kaufman Warren Consolidated Schools 31300 Anita Warren, MI 48093
Michigan Council of Vocational Administrators MCVA (517) 279-7524	W. Wade Smith Branch Intermediate School District P. O. Box 509 Coldwater, MI 49036
Michigan Health Occupations Educators MHOE (313) 941-0800	Robert Brock Romulus High School 9650 South Wayne Road Romulus, MI 48174
Michigan Home Economics Association MHEA (517) 774-3218	Janis Voege Central Michigan University Mt. Pleasant, MI 48858
Michigan Home Economics Educators MHEE (313) 642-0437	Pamela Schaffer 17401 Beechwood Birmingham, MI 48009

SECONDARY ORGANIZATIONS	PRESIDENT
Michigan Industrial Education Society MIES (616) 845-6703	Frank Koehle 210 Tinkham Ludington, MI 49431
Michigan Occupational Education Association MOEA (313) 762-1101	Dave Dvorak Mott Adult High School 1231 East Kearsley Flint, MI 48503
Michigan Trade and Technical Educators MTTE (313) 354-8210	Robert Younker 15900 Merriman Road Livonia, MI 48154
Michigan Vocational Coordinators Association MVCA (616) 538-4200	Charlene Roberts Wyoming Public Schools 2820 Clyde Park, S.W. Wyoming, MI 49509
Michigan Vocational Curriculum Leaders MVCL (616) 399-6940	John Hyde Ottawa Area Skill Center 13565 Port Sheldon Road Holland, MI 49423
Michigan Occupational Special Needs Association MOSNA (313) 956-0577	Jeanetta Floyd Highland Park Community College Glendale at Third Highland Park, MI 48203

COMMUNITY COLLEGE ORGANIZATIONS	PRESIDENT
Michigan Apprenticeship Coordinators Association MACA (313) 271-2750	Vern Krebsbach Apprenticeship-Related Instruction Henry Ford Community College Dearborn, MI 48128
Michigan Apprenticeship Steering Committee MASC (517) 636-4791	Robert Johnson, Chairperson Dow Chemical Company 294 Building Midland, MI 48640
Michigan Occupational Deans Administrative Council MODAC (616) 456-4965	Dr. Till Peters Grand Rapids Junior College 143 Bostwick, N.E. Grand Rapids, MI 49503

HIGHER EDUCATION ORGANIZATIONS	PRESIDENT
Michigan Association of Teacher Educators for Business MATEB (616) 796-0461	Dr. Mary Havercamp Business Education Ferris State College Big Rapids, MI 49307

HIGHER EDUCATION ORGANIZATIONS	PRESIDENT
Michigan Council of Industrial Teacher Educators MCITE (616) 471-7771	Dr. Laun Reinholtz Andrews University Berrien Springs, MI 49104
Michigan Home Economics Teacher Educators MHETE (616) 383-1600	Dr. Sue Coates Home Economics Department Western Michigan University Kalamazoo, MI 49008
Michigan Occupational Teacher Education Association MOTEA (313) 487-1849	Dr. Gerald Jennings Eastern Michigan University Sill Hall Ypsilanti, MI 48197

PROFESSIONAL PERIODICALS, CURRICULUM GUIDES, AND FILMS FOR BUSINESS EDUCATORS

Administrative Management, Geyer-McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY 10010.

Advanced Office Concepts, Amy D. Wohl, Editor, Advanced Office Concepts Corporation, One Bala Cynwyd Plaza, Suite 516, Bala Cynwyd, PA 19004; (215)667-5993, $95/year (1-5) copies.

AOS Automated Office Systems, 419 Boylston Street, Suite 312, Boston, MA 02116, Monthly publication, subscription $95.00.

Audio Individualized Competency Based Instruction in Word Processing For The Blind, Author; Anna Pavelka, Instructor for Accelerated Word Processing Program, Laney College, 900 Fallon Street, Oakland, CA 94607.

AVT Machine Transcription, Arnold Rosen, Media Systems Corporation, Subsidiary of Harcourt Brace Javanovich, 757 Third Avenue, New York, NY 10017.

The Balance Sheet, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Battery Man, Independent Battery Manufacturer, Incorporated, 100 Larchwood Drive, Largo, FL 33540; $9/year, $1.50/copy.

Beautiful Girls--Sally Hawkins, Machine Army (these two films are especially good for secondary level), Fine Art (management oriented), Herman Miller, Contact your local distributor for use.

Boardroom Reports, 500 Fifth Avenue, New York, NY 10110, $44/year (26 issues).

Breaking The Production Barrier, From Thoughts to Words to Action, Opportunity Word Processing, System 6, Contact your local IBM salesman.

Business And Office Insider, AVA, 2020 North 14th Street, Arlington, VA 22201; published 2x/year for AVA members.

Business Communications, The University of the State of New York, State Education Department, Bureau of Business, Marketing and Distributive Education, Albany, NY 12234, 1982.

Business Education Forum, Journal of MBEA, Published eight times a year (Subscription price included in MBEA dues).

Business Education World, Published by Gregg/McGraw-Hill, Service to Business Educators, 13955 Manchester Road, Manchester, MO 63011.

Business English Basics, Self Instructional Approach, Moyer, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016 (1980).

Business Equipment And The Courts: Guide For Court Managers, Publications Department, National Center for State Courts, 1660 Lincoln Street, Suite 200, Denver, CO 80264.

Canadian Office, Whitsed Publishing Limited, 2 Bloor Street West, Toronto, M4W 3G1.

Career World, Curriculum Innovations Incorporated, 3500 Western Avenue, Highland Park, IL 60035; $4.50/student/school year.

A Catalog of Performance Objectives, Performance Guides, Tools & Equipment (For Word Processing Administrative Support Secretary and Word Processing Correspondence Speicialist), Michigan Vocational Materials Resource Center, 133 Erickson Hall, Michigan State University, East Lansing, MI 48824.

Centergram, The National Center for Research in Vocational Education, The Ohio State University, 1960 Kenny Road, Columbus, OH 43221; (614)486-3655.

Century 21 Reporter, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227.

Communication Skills For The Processing Of Words, Reiff, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227; (1980).

Comparison Guide To Phototypesetting Systems, Seybold Publications, International Information/Word Processing Association, 1015 Madison Road, Cincinnati, OH 45227 (1980).

The Complete Guide to Effective Dictation, Jean Gonzalez, Kent Publishing Company, Ten Davis Drive, Belmont, CA 94002.

Comprehensive Word Processing, (A machine transcription course) McLean & Reoiland, Western Tape, P.O. Box 69, Mountain View, CA 94040.

Computer Business News, 375 Cochituate Road, Box 880, Framingham, MA 01701. Published weekly, $25/year.

Computer Decisions, Hayden Publishing Company, Incorporated, Box 13802, Philadelphia, PA 19101. Published monthly, free to qualified subscribers, otherwise $26 per year.

Computerworld, Box 880, Framingham, MA 01701. Published weekly, $36/year.

Concepts, Wang Laboratories, Incorporated, One Industrial Avenue, Lowell, MA 01851. Published Quarterly. Free to Wang WP/DP equipment users, otherwise $16 annual non-membership subscription.

Cooperative Education Quarterly, Published by VEST, Incorporated, P.O. Box 2513, Hamilton Square, NJ 08690; $7.50/year.

Corporate Systems, United Technical Publications, Incorporated, 645 Stewart Avenue, Garden City, NY 11530.

CPT (Learning An Acquaintanceship Level), Frey, sold by Audio Visual, University of Minnesota.

Creative Computing, P.O. Box 789-M, Morristown, NJ 07960. Published monthly, $20/year subscription fee.

Dartnell's Glossary of Word Processing Terms, The Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, IL 60640.

Datamation, 666 Fifth Avenue, New York, NY 10103. Publication monthly (except two issues in December), free to individuals who are employed by companies involved with automatic information handling equipment, otherwise $36 subscription fee.

Data Processor, International Business Machines Corporation, 1133 Westchester Avenue, White Plains, NY 10604. Monthly publication, free.

Datapro Reports On Word Processing, Datapro Research Corporation, 1805 Underwood Blvd., Delran, NJ 08075. Includes looseleaf volume of reports, 12 monthly WP news.

Developing Proofreading Skill, Sue C. Camp, McGraw-Hill Publishing Company, New York, NY 10001 (1980).

The Dictation Book, Auren Uris, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090.

Eighth Salary Survey Results, 1982, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090.

Electronic Education, Suite 220, 1311 Executive Center Drive, Tallahassee, FL 32301; $10/year.

Essentials of Supervisory Management, Bittel, Gregg/McGraw-Hill, Princeton Road, Hightstown, NJ 08520.

From Nine to Five or Thereabouts, The Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, IL 60640. Published monthly.

The Gregg Reference Manual, Fifth Edition, Sabin, McGraw-Hill Publishing Company, New York, NY 10001.

Guidebook To Word Processing Work Measurement, Arthur Thursland, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Guidelines For Selecting And Using An Information/Word Processing Consultant, published by International Information/Word Processing Association, 1015 N. York Road, Willow Grove, PA 19090; Free to IWP members.

High Technology, Technology Publishing Company, P.O. Box 2810, Boulder, CO 80322; $15/year.

How To Dictate, Schrag, Gregg/McGraw-Hill, 13955 Manchester Road, Manchester, MO 63011 (Attention: Anne Williams, $5.95, 1981).

How 2, A Handbook For Office Workers, Second Edition, Clark & Clark, Wadsworth Publishing Company, Incorporated, Belmont, CA 94002.

Human Relations At Work (2nd. edition), Steven A. Eggland and John W. Williams, South-Western Publishing Company, Cincinnati, OH; 1981.

Human Resources And Word Processing, IWP & Deutsch, Shea & Evans, Incorporated. International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090. Seutsch, Shea,& Evans, Inc.

Impact: Information Technology, Administrative Management Society, Maryland Road, Willow Grove, PA 19090; monthly.

Information and Word Processing Report, Geyer-McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY 10010; $106/24 issues, $8.83/month.

The Information Manager, Information & Records Management, Incorporated, 250 Fulton Avenue, Hempstead, NY 11550.

Information Management Portfolio; Information Industry Review (monthly); InterComm (bimonthly); Words (bimonthly), International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090. Available to IWPA members, $50/year membership dues.

Information & Records Management, 250 Fulton Avenue, Hemstead, NY 11550. Published 13 times a year, free to qualified subscribers, otherwise $7.50/year.

Information Systems, Taggart, Allyn & Bacon, Incorporated, 470 Atlantic Avenue, Boston, MA 02210.

Information Systems News, 333 East Shore Road, Manhassett, NY 11030; free.

Infosystems, Hitchcock Publishing Company, Hitchcock Building, Wheaton, IL 60187.

Infoworld, Popular Computing, Incorporated, 530 Lytton Avenue, Palo Alto, CA 94301. Published bi-weekly, $18/year.

In-Plant Reproductions, North American Building, 401 North Braod Street, Philadelphia, PA 19108; $25/year.

Intensified Office Skills: Word Processing, Sylvia Myers, Winters High School, 101 Grant Avenue, Winters, CA 95694 (1976).

Interface, Published by International Computing Corporation, 9000 Keystone Crossing, Indianapolis, IN 46240. Published quarterly, free to qualified persons, otherwise $10.

Introduction To Word Processing, Alltech Publishing, Pennsauken, NJ 08110.

Introduction To Word Processing, Johnson & Quible, Winthrop Publishers, Incorporated, 17 Dunster Street, Cambridge MA 02138 (1980).

Introduction To Word Processing, Mason, Bobbs-Merrill Company, Incorporated, 4300 West 62nd Street, Indianapolis, IN 46268.

Introdution To Word Processing; Skills and Simulations, Mason, Bobbs-Merrill Company, Incorporated, 4300 West 62nd Street, Indianapolis, IN 46268.

IWP Packet Series, Part One: Selected Articles For The Word Processing Novice, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090.

IWP Packet Series, Part Two: Selected Articles (Intermediate), International Word Processing Association, Maryland Raod, Willow Grove, PA 19090.

IWP Word Processing Industry Directory, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090 (members $4.00).

Journal Of Systems Management, 24587 Bagley Road, Cleveland, OH 44183. Published monthly, $17.50 per year, free to members of ASM.

Keyboarding For Information Processing, Hanson and Rigby, Gregg/McGraw-Hill, Princeton Road, Highstown, NJ 08520.

Labor Register, Official Journal Of The Michigan Department Of Labor, Office of Public Affairs, 7150 Harris Drive, Box 30015, Lansing, MI 48909; (517)373-9464, free published monthly.

Lanier Individualized Instruction Course, Lanier Business Systems, 1700 Chantilly Drive, North East, Atlanta, GA 30324.

Luther Burbank Senior High School ROP Secretary/Word Processing Course, Patricia Duschka, Luther Burbank Senior High School, Business Education Regional Occupational Program, 3500 Florin Road, Sacramento, CA 95800.

Machine Transcription, Schatz and Funk, Gregg/McGraw-Hill, Princeton Road, Hightstown, NJ 08520.

Machine Transcription Course, Dictation Disc Corporation.

Machine Transcription and Dictation, Kupsch, Anderson, Meyer and Moyer, John Wiley & Sons, Incorporated, 605 Third Avenue, New York, NY 10016.

Machine Transcription By Lanier, Lanier Business Systems, 1700 Chantilly Drive, NE, Atlanta, GA 30324.

Machine Transcription in Modern Business, Meyer & Moyer, John Wiley & Sons, Incorporated (1978).

Machine Transcription Word Processing, Pasewark, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227 (1980).

MACUL Journal (Published 2-3/year); "Checkpoint" newsletter (bimonthly), Michigan Association for Computer Users in Learning, Larry R. Smith, Wayne County Intermediate School District, 33500 VanBorn Road, Wayne, MI 48184; available to members, membership $5.00/year.

Making WP Demonstrations Work For You, D. Martin, International Information/Word Processing Association, 1015 North York Road, Willow Grove PA 19090; $10.

Management Information For Information Managers, Peter S. Taylor and R. Bruce Tuck, International Information/Word Processing Association, 1015 North York Raod, Willow Grove, PA 19090; free to members.

Management Introduction To Word Processing, Superintendent of Documents, U.S. Government Printing Office, Washington, DC 20402.

Management Of Word Processing Operations, Paula Cecil, Cummings Publishing Compaly, Menlo Park, CA 94025 (1980).

Management Report On: Word Processing Text Editing/Auto Typing Equipment, Office Management Systems Corportation, 37 West Seventy-Second Street, New York, NY 10023.

Management World, Administrative Management Society, AMS Building, Maryland Road, Willow Grove, PA 19090.

Management's Guide To Word Processing, Kleinschrod, Dartnell Corporation, 4660 Ravenswood Avenue, Chicago, IL 60640 (1977).

Medical Economics, Box 55, Oradell, NJ 07649. (201)262-3030, $44/year, (26 issues) or $3/copy.

Mercury Systems, Incorporated, Typing Practice Set In Word/Information Processing For Use With Text-Editing Or Conventional Typewriters, Boyce, Gregg/McGraw-Hill, Princeton Road, Hightstown, NJ 08520.

Microcomputing, Published by Wayne Green, Incorporated, 80 Pine Street, Peterborough,NH 03458. Published monthly, $25/year.

Microfilm Techniques, 250 Fulton Avenue, Hempstead, NY 11550. Bimonthly, free.

Mini-Micro Systems, Cahners Publishing Company, 221 Columbus Avenue, Boston, MA 02116. Published monthly, free to qualified subscribers, otherwise $30 subscription fee.

MIS Week, Fairchild Publications, P.O. Box 1003, Manasquan, NJ 08736. Published weekly, free to qualified individuals, otherwise $35 annually.

Model Office- Correspondence Secretary, Frey & Thompson, Milady Publishing Corporation.

Modern Office Procedures, Industrial Publishing Company, 614 Superior Avenue, West, P.O. Box 95759, Cleveland, OH 44101; free.

New York State Machine Transcription, Western Tape, P.O. Box 69, Mountain View, CA 94040.

Occupations In Demand, At Job Service Offices, U.S. Department of Labor, Employment and Training Administration, Washington, D.C. 20213.

The Observer, P.O. Box 1119, Aptos, CA 95003 (formerly Word Processing News); $95/year.

The Office, Office Publications, Incorporated, P.O. Box 13205, Philadelphis, PA 19101.

Office Products, Hitchcock Publishing Company, Wheaton, IL 60187 (Marketing office supplies, machines, and furnishings).

Office Systems and Procedures, Luke, Cheryl M., and Stiegler, C.B., Mifflin Company, Boston, MA; 1982.

Office Topics, Published by Economics Press, Incorporated, 12 Daniel Road, Fairfield, NJ 07006; $9.01/6 months (13 issues).

OPA (The Office Product Analyst), Published by MSRA, Incorporated, Department A, Room 200, 115 Broadway, New York, NY 10006; monthly newsletter, $140.

Output, Technical Publishing, Circulation Office, 666 Fifth Avenue, New York, NY 10103; published monthly, $18.

Output Alternatives - Some Considerations, Seybold Publications, Box 644, Media, PA 19063. $10, (A detailed report which compares printout quality of peripheral devices for word processing systems).

Papers And Proceedings, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090; $20.00.

Personal Computing, Hayden Publishing Company, Incorporated, 50 Essex Street, Rochelle Park, NJ 07662.

Personal Report for the Professional Secretary, Research Institute of America, 589 Fifth Avenue, New York, NY 10017.

Power Typewriting In Today's Office, Cecil, Western Tape, 2761 Marine Way, P.O. Box 69, Mountainview , CA 94040.

Printout, Business Computer Publications, Incorporated, 1411 St. Germain Street, St. Cloud, MN 56301; published bi-monthly, free to qualified individuals, otherwise $9/year.

Printout Annual, Datek of New England, P.O. Box 68, Newtonville, MA 02160 (printer technology and trends, free to printer decision makers using company letterhead; or $25/annual.)

Proofreading, Sharon Preston, Western Tape, P.O. Box 69, Mountain View, CA 94040.

Quick Strokes, Box 643, West Sacramento, CA 95691. Published quarterly, $5/year.

Racquets Unlimited, Levitt, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227 (1980).

Redactor Editing Typwriter Dual Magnetic Card Model, Series B, Training Manual, Wagoner, McHolland, and Walker, Ball State University, Muncie, IN 47306.

The Reference Guide, Houghton Mifflin Company, Boston, MA; 1980.

Reference Guide To WP Education, IWP Educators Advisory Council, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090. ($3.50).

Report Writing, George P. Grill, South-Western Publishing Company, 5101 Madison Road, Cincinnati, OH 45227 (1980).

Resource Guide For Performance-Based Word Processing Instruction, Gerald F. Day, Project Director, University of Maryland, Department of Industrial Education, College Park, MD 20742.

Revitalization of Basic Business Education At All Levels, NBEA Yearbook, No. 20, 1914 Association Drive, Reston, VA 22091.

Sample Guidelines For Work Assignments, Levels And Career Development Of Administrative And Correcpondence Secretaries, IBM Office Products Division, Parson's Pond Drive, Franklin Lakes, NJ 07417.

The Secretary, published by the Professional Secretaries International, 2440 Pershing Road, Suite G10 Crown Center, Kansas City, MO 64108. Published nine times a year, $12 subscription.

Secretarial Office Procedures, South-Western Publishing Company, Cincinnati, OH; 1982.

Selected Articles, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090; $5.00.

The Seybold Report On Word Processing, Seybold Publications, Incorporated, Box 644, Media, PA 19063. Published monthly, $60.

Shorthand Motivation Manual, A How-To Approach, Gregg/McGraw-Hill.

Software Age, 2211 Fordem Avenue, Madison, WI 53701. Monthly publication, free.

Spelling Drills and Exercises, Brendel and Near, Gregg-McGraw-Hill, New York, NY 10001.

Starting A Revolution In Office Efficiency, Geyer-McAllister Publications, Incorporated, 51 Madison Avenue, New York, NY 10010.

Summary Report Of National Study of Word Processing Installations In Selected Business Organizations, Scriven, Delta Pi Epsilon, Gustavus Adolphus College, St. Peter, MN 56082 (1980).

Telecommunications, 610 Washington Street, Dedham, MA 02026. Published monthly, except semi-monthly in September, free to qualified individuals, otherwise $36/year.

Telephone Personality, Economics Press, Incorporated, 12 Daniel Road, Fairfield, NJ 07006; $23.14 (14 issues).

Today's Education, Journal of the National Education Association, published four times a year, National Education Association of the United States, 1202 16th Street, N.W., Washington, D.C. 2003

Today's Office (Circulation Manager), 645 Stewart Avenue, Garden City, NY 11530; $35/year, $3/single copy.

Today's Office (formerly Office Product News), Hearst Business Publications, 645 Stewart Avenue, Garden City, NY 11536.

Today's Secretary, Gregg/McGraw-Hill Publications, P.O. Box 441, Hightstown, NJ 08520.

Training World, Woodbury Communications, Incorporated, 80 North Broadway, Hicksville, NY 10801. Bi-monthly publication (except in September when an extra issue is published), subscription $15/year.

Transcription Cassette Tapes, Audio Cassettes, Lanier Business Products, 1700 Chantilly Drive, NE, Atlanta, BA 30324 (1975).

The Transcription Specialist: A Text Workbook, Edith E. Ennis, Marilyn E. Price, and Sheila K. Vedder, Harcourt Brace Jovanovich, Incorporated, 7555 Cladwell Avenue, Chicago, IL 60648.

Typeworld, Blum Publications, 15 Oakridge Circle, Wilmington, MA 01887; published monthly, $20 subscription fee.

Viewpoint, Bulletin, Word Processing Association, Maryland Road, Willow Grove, PA 19090. Published monthly, subscription included with IWP membership.

Viewpoint, IBM Corporation, General Systems Division, P.O. Box 2068, Atlanta, GA 30055. Published bimonthly.

Viewpoints In Business And Office Education, MPC Educational Publishers, A division of Milady Publishing Corporation, 2829 White Plains Road, Bronx, NY 10467. Monthly September through April, free to Business/Office Education Teachers.

Voc Ed. Journal of the American Vocational Association, American Vocational Association, 2020 North 14th Street, Arlington, VA 22210. Published monthly September through June.

VYDEC 1200 Text Editor, Learning Kit - Program Graphics.

The Word, Word Processing Society, Inc., P.O. Box 92553, Milwaukee, WI 53202. Published monthly, subscription $15/year to non-members of the Word Processing Society.

The Word Book, Kahn & Mulkerne, Gencow Press, 8701 Wilshire Boulevard, Beverly Hills, CA 90211.

Word/Information Processing, Concepts, Careers, Technology and Applications, Marly Bergerud & Jean Gonzalez, John Wiley & Sons, Inc., 2nd ed., 605 Third Avenue, New York, NY 10016. (Instructor's Manual also available.)

Word Processing, Anderson and Trotter, Amacom, 135 West 50th Street, New York, NY 10020.

Word Processing: An AMA Management Briefing, Walter A. Kleinschrod, A thirty-page booklet describing the complete spectrum of word processing, published by AMACOM, a division of American Management Associations, 135 West Fiftieth Street, New York, NY 10020.

Word Processing and Information Systems, (formerly word processing systems), a monthly magazine dealing with Automated Business Communications, published by Geyer-McAllister Publications, Inc., 51 Madison Avenue, New York, NY 10010.

Word Processing Career Opportunities, Wagoner, Bureau of Business Reserach, College of Business, Ball State University, Muncie, IN 47306.

Word Processing Concepts, Casady, South-Western Publishing, 5101 Madison Road, Cincinnati, OH 45227 (1980).

Word Processing: Concepts and Applications, Ellis, Gregg/McGraw-Hill, with Dictation Cassettes (optional) and Teacher's Manual and Key (1980).

Word Precessing: Concepts and Careers, Bergerud and Gonzales, John Wiley & Sons, Inc., 605 Third Avenue, New York, NY 10016.

The Word Processing Correspondence Secretary, Palmetto Insurance Co., Matthews and Moody, South-Western Publishing Co., 5105 Madison Road, Cincinnati, OH 45227.

Word Processing Curriculum, IBM Office Products Division, Parson's Pond, Franklin Lakes, NJ 07417.

Word Processing Curriculum, Janette Garofalo et al., Connecticut State Department of Education, BOE Vocational Division, Room 344, State Office Building, P.O. Box 2219, Hartford, CT 06115.

Word Processing Curriculum, Minnesota Department of Education, Business and Office Education, Capital Square Building, 550 Cedar Street, St. Paul, MN 55101.

Word Processing Curriculum Guide, Marcia Anderson and Robert Kusek, Illinois Office of Education, Department of Adult, Vocational and Technical Education, Springfield, IL 62701 (now available through NBEA).

Word Processing Curriculum Guidelines, South Carolina Office of Vocational Education, Office Occupations Section, 920 Rutledge Building, Columbia, SC 29201.

Word Processing Curriculum Model And Teacher's Guide, Illinois Office of Education, Division of Adult, Vocational, and Technical Education, 1035 Outer Park Drive, Springfield, IL 62706.

Word Processing And Employment, A Survey Report, International Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing And Information Systems, Geyer-McAllister Publications, Inc., 51 Madison Avenue, New York, NY 10010. $16/year or $3/single copy.

The Word Processing Explosion, Konkel and Peck, Office Publications, Inc., P.O. Box 1231, 1200 Summer Street, Stanford, CT 06904.

Word Processing Films. Ten 16mm films, color, Information Management Corporation, P.O. Box 2076, Green Bay WI 54306. With Word Processing Instructor's Guide. Dictation - Napoleon to Now (12 minutes); "In" Side Word Processing (9 minutes); It's Really People (12 minutes); Kissing The Girls Goodbye (13 minutes); "Out" Side Word Processing (9 minutes); The Pivot Point (12 minutes); The Rules Of The Game (11 minutes); Take It From The Top (15 minutes); What's It All About (11 minutes); Worries And Wonder (12 minutes).

Word Processing Fundamentals, Waterhouse, Harper and Row, 10 East 53rd Street, New York, NY 10022.

Word Processing Glossary, International Information/Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing Glossary, Compiled by Lori Schultz, Word Processing Society, Inc., P.O. Box 92553, Milwaukee, WI 53202.

Word Processing In The Modern Office, Cecil-Cummings Publishing Company, Inc., 2727 Snad Hill Road, Menlo Park, CA 94025. Student workbook and teacher's manual available.

Word Processing and Information Systems, Geyer-McAllister Publications, Inc., 51 Madison Avenue, New York, NY 10010. Published monthly, subscription $16/year.

Word Processing News, (A Research Newsletter), 812 Via Tournasol, P.O. Box 1119, Aptos, CA 95003. Published six times a year by Paula Cecil, author of several WP texts, free.

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Word Processing: Office Of The Future, Media Systems Corp., 757 Third Avenue, New York, NY 10017.

Word Processing: Operations, Applications And Administration, Kleinschrod Kruk, and Turner, Bobbs-Merrill Publishing Co. With teacher's manual, (1980).

Word Processing Package, CPT Corporation, 1001 Second Street, South, Minneapolis, MN 55343.

Word Processing Salary Survey (conducted annually), International Information/Word Processing Association, Maryland Road, Willow Grove, PA 19090.

Word Processing Skills And Simulations, Jennifer Mason, Bobbs-Merrill Publishing Co., Indianapolis, IN 46206.

Word Processing Slides, Golden Visuals. P.O. Box 1177, Huntington Beach, CA 92647.

Word Processing Systems User Ratings, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090.

Word Processing Survey: High Schools And Colleges Offering WP Courses, Gleckner, DAG Magnetic Associates, Inc., P.O. Box 606, Paramus, NJ 07652 (1981).

Word Processing Up-To-Date (Slides), DAG Magnetic Associates, Inc., Box 606, Paramus, NJ 07652.

Words, International Invormation/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090. Published bimonthly, subscription $15/year to non-members of II/WP.

Word Measurement: A Guidebook To WP Management, Arthur Thursland. A revised second edition of this hardcover book is an invaluable guide to measuring the output of a WP center. International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090. Members $35, non-members $45.

The WP Book, Kutie & Huffman, John Wiley & Sons, Inc., 605 Third Avenue, New York, NY 10016 (1980).

The WP Book, An Individualized Learning Guide, Kutie & Huffman, John Wiley & Sons, Inc., 605 Third Avenue, New York, NY 10016 (1980).

WP Education, International Information/Word Processing Association, 1015 North York Avenue, Willow Grove, PA 19090.

WP Industry Directory, International Information/Word Processing Association, 1015 North York Road, Willow Grove, PA 19090.

Writing A Word Processing Grant Proposal, Rosemary Fielden, International Information/Word Processing Association, 1015 North York Avenue, Willow Grove, PA 19090. $3.50.

APPENDIX

JOB TITLES AND DESCRIPTIONS FOR WORD PROCESSING PERSONNEL
(as defined by the International Information/Word Processing Association)

A. WORD PROCESSING TRAINEE

Entry level position for those having 0-12 months word processing experience. Must have adequate typing skills, good knowledge of grammar, punctuation, spelling and formatting, the ability to use dictionaries, handbooks and other reference materials, and be oriented toward teamwork and the use of machines. A trainee's functions include routine transcription and manipulation of text from various types of source information (dictation, handwritten, etc.). Maintains own production records, and may be required to proofread own work.

B. WORD PROCESSING OPERATOR

The next level up from WP Trainee for those having 6-24 months word processing experience. In addition to having all the qualifications and functions of position A, a word processing operator handles special documents, meets established quality standards, uses all of a machine's text editing functions and is familiar with department terminology and company practices.

C. WORD PROCESSING SPECIALIST I

A word processing operator with a minimum of 18 months experience who can format, produce and revise complicated documents, such as lengthy technical and statistical reports, from complex source information, including the retrieval of text and data from electronic files. Exercises independent action when interpreting instructions to produce a quality document, understands proofreader marks, and assumes full responsibility for document accuracy and completeness. Has a thorough knowledge of center procedures and maintenance of records. May operate word processing equipment in the telecommunications mode.

D. WORD PROCESSING SPECIALIST II/ASSISTANT SUPERVISOR

A person at this level exercises all of the competencies of position C and may act as assistant superviosr. A Word Processing Specialist II is able to operate all the information processing equipment within the installation. Responsibilities include coordinating and assigning work, analyzing requirements, for specific projects, communicating with users, compiling production statistics and recommending changes in center procedures. May also assist in training personnel.

E. PHOTOTYPESETTING SPECIALIST

A word processing operator who enters special codes while keyboarding and revising text that is to be output on a photocomposition system. Has knowledge of points, picas, typefaces, leading, format requirements, production techniques, and other aspects of typesetting and printing.

F. WORD PROCESSING TRAINER

Someone with a minimum of 24 months experience operating word processing systems who spends the majority of time training new operators. May also be responsible for instructing users in dictation methods and other procedures to insure maximum utilization of a wp center. Should make recommendations to management concerning new equipment purchases from the standpoint of ease of use.

G. PROOFREADER
Proofreads typed copy for text content, spelling, punctuation, grammar, and typographical errors. May be responsible for setting grammar and format standards, guidance and/or training of secretaries and principals.

H. WORD PROCESSING SUPERVISOR
With all the competencies of a word processing specialist II, a supervisor is responsible for the operation of a center (or section within a large center). Schedules and coordinates work flow, assists word processing personnel in document production and in establishing and maintaining quality standards. Also anaylzes production data and procedures, identifies potential imporovements and may be responsible partially for budgets and equipment recommendations. Reports to word processing manager.

I. WORD PROCESSING MANAGER
Exempt (salaried). Responsible for the overall operation of a word processing center, including the guidance of supervisors, personnel administration, staff requirements, user liaison and evaluation, design and implementation of future wp systems. Also is responsible for budgets, overall production reports, and coordination of services with administrative support. May also manage the operation of photocopying, printing, mailing or graphics services. In larger organizations, the word processing manager reports to Information Manager.

AA. ADMINISTRATIVE SECRETARY
Someone who works for a group of principals as part of a team under the direction of an administrative support supervisor or manager. Responsibilities include such support functions as filing, photocopying, maintaining calendars, records and lists, and providing special secretarial services, etc.

BB. SENIOR ADMINISTRATIVE SECRETARY
Has a record of exceptional performance. At times may act as assistant to supervisor of an administrative team and is qualified to compose and edit documents for principals, provide research support and perform other para-professional duties. Handles special projects and is fully aware of company standards and practices.

CC. ADMINISTRATIVE SUPPORT SUPERVISOR
May have the responsibilities of position BB in addition to scheduling and administering work flow to a team of administrative secretaries. Responsible for liaision with the training of users who benefit from administrative support. Evaluates staffing requirements, prepares management reports, recommends new methods of handling administrative secretaries. Reports to Administrative Support Manager.

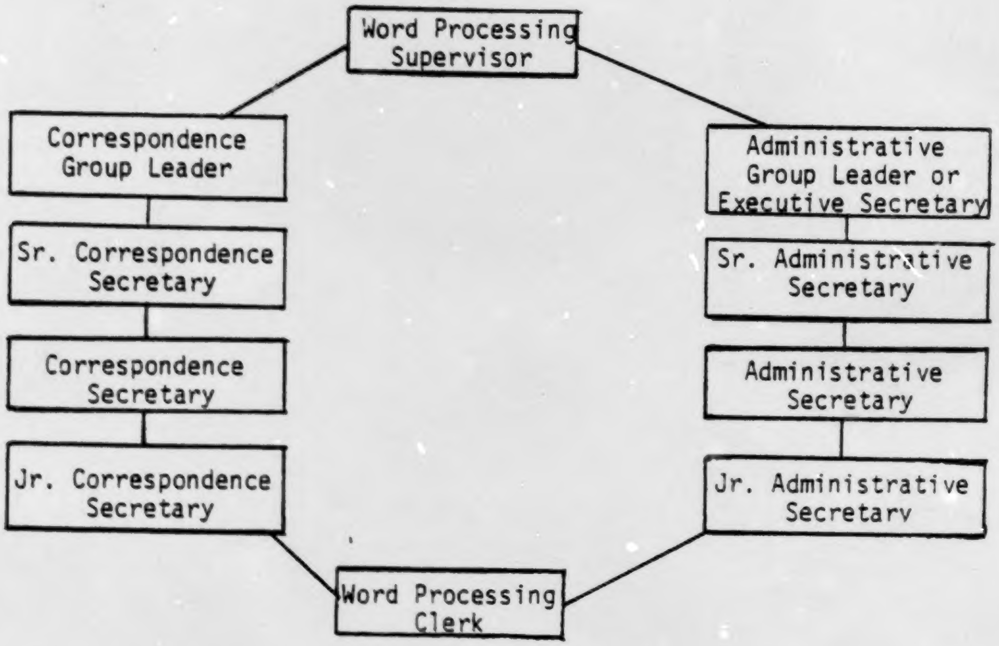
DD. ADMINISTRATIVE SUPPORT MANAGER
Exempt (salaried). Has full responsibility for developing, maintaing and evaluating all services under administrative support within an organization, such as filing, telephone, mail and para-professional support. Monitors the success of the administrative support group and is familiar with the company's goals and objectives. Works closely with the word -

processing manager to ensure cooperation of the two functions. May manage other major administrative duties such as records and retention, microfilm, print shop, purchasing, etc. Reports to Information Manager (in large organizations).

EE. STAFF ANALYST
Exempt (salaried). Responsible for consulting and assisting word processing and administrative support supervisors and managers. Conducts studies, reviews operations and determines and recommneds appropriate staffing, procedures and equipment. Reports to Information Manager or Word Processing Manager or Administrative Support Manager.

J. INFORMATION MANAGER
Exempt (salaried). Has total responsibility for all aspects of an organization's office system, including word processing, administrative support and other information processing functions. Ensures the collaboration of all support functions. May report to vice president or chief executive office in some organizations.

EXAMPLE OF A WORD PROCESSING CAREER PATH


Word Processing Supervisor
Correspondence Group Leader
Sr. Correspondence Secretary
Correspondence Secretary
Jr. Correspondence Secretary
Administrative Group Leader or Executive Secretary
Sr. Administrative Secretary
Administrative Secretary
Jr. Administrative Secretary
Word Processing Clerk

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*C. Paty Kozlowski, "Word Processing: What are Educators Facing Today", Balance Sheet, 62 (October, 1980), 52-56

*SAMPLE FOR MEASURING WORD PROCESSING DOCUMENT PRODUCTION BY LINES

Measure Production by Lines

Instruct students to type a line-count guide:

1	Double	Single	1
	Spacing	Spacing	2
2			3
			4
3			5
			6

Make an overlay transparency for each student.
Be consistent in counting lines of letters, memorandums, and documents with both single and double spacing.

Evaluate in Terms of Error Percentage

Total Errors ÷ Total Lines = Error %

6 errors, 187 lines: 600 (add two zeros) ÷ 187 = 3.21%

or

6.00 ÷ 187 = .0321 = 3.21%

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*Reprinted with the permission of Dr. Mona J. Casady, Professor, "Simulating Word Processing Procedures in Business Education Classes" (Class Exercise), Department of Office Administration and Business Education, Southwest Missouri State University, Springfield, MO 65802

*SAMPLE FOR LOGGING WORD PROCESSING PRODUCTION WORK

Logging Production Work

Date	Time In	Job Description	Type of Document	Input Form	Lines	Errors	Time Out	Minutes
4-18	9:10	To B Barge	L M R S	L R S	32	1		
		To Sales Dept	L M R S	L R S	24	0	9:30	20

TYPE OF DOCUMENT

L Letter
M Memorandum
R Report
S Statistical

INPUT FORM

L Longhand
R Rough Draft
S Straight Copy

Total Lines 187

Total Errors 6

Error Percentage 3.21%

Total Minutes 95

Lines Per Minute 1.97

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*SAMPLE

WORD PROCESSING SERVICES LOG

OBE 399 Word Processing, OBE Dept, SMSU

Secretary Pam Cummins

Date	Time In	Tape #	Author's Name	Class Sec	Type of Doc	Input Form	Output Form	Lines	Total Lines	Errors	Time Out	Total Min
2-18	10:00	Aud 5	Jerry Wood	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	27	0		
		Aud 5	[illegible]	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	30	2		
		Aud 5	[illegible]	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	26	0		
		Class 2	Kitty McNeely	12	[✓ L] M R S	[✓ D] L PR RD	[✓ FC] RD	[✓ O] RP RV	29	1	10:55	55
2-20	1:30	#929	[illegible]	2	L [✓ M] R S	[✓ D] L PR RD	FC [✓ RD]	[✓ O] RP RV	22	2		
		#929	[illegible]	2	L [✓ M] R S	[✓ D] L PR RD	FC [✓ RD]	[✓ O] RP RV	24	1		
			Jim Clark	2	[✓ L] M R S	D L PR [✓ RD]	[✓ FC] RD	O RP [✓ RV]	21	0	1:40	40
					L M R S	D L PR RD	FC RD	O RP RV				
					L M R S	D L PR RD	FC RD	O RP RV				
TOTALS					5 2	6 1	5 2	6 1	187	6		95

TYPE OF DOCUMENT	INPUT ORIGIN	OUTPUT FORM	LINES
L Letter	D Dictated	FC Final Copy	O Original Dict
M Memorandum	L Longhand	RD Rough Draft	RP Repet Playback
R Report	PR Prerecorded		RV Revision
S Statistical	RD Rough Draft		

No. of Documents Trans 7

Total Lines Transcribed 187

Total Errors 6

Error Percentage 3.21

Total Min of Trans 95

LPM (Lines per minute) 1.97

Proofread by Terri Marcum

CONTROL SUMMARY of Word Processing Services Log
OBE Department, SMSU

February 18-22
Week

Secretary	No of Doc	Type of Document				Type of Input				Output Form		Lines			Total Lines	Total Errors	% of Error	Total Min	LPM
		L	M	R	S	D	L	PR	RD	FC	RD	O	RP	RV					
Judy Adams	9	9				9				9		[illegible]			229	7	3.35	100	2.29
Pam Cummins	7	5	2			6			1	5	2	[illegible]		[illegible]	187	6	3.21	95	1.97
Cathy Davis	5	5				5				5		[illegible]			153	6	3.92	85	1.80
Wilma Kaufman	6	6				5			1	6		[illegible]		[illegible]	192	3	1.56	105	1.83
Terri Marcum	6		3		3	[illegible]				3	3	[illegible]		[illegible]	[illegible]	3	1.57	60	3.16
Candy Marsicus	6	6				4			2	6		[illegible]		50	223	5	2.24	105	2.12
Patty McDowell	7	7				7				7		[illegible]			240	8	3.33	57	4.21
Pam Reed	7	7				3			4	4	3	[illegible]		95	245	3	1.22	76	3.22
Cindi Smith	6	6				6				6		[illegible]			178	7	3.93	72	2.47
Debbie Smoot	12	9	1		2	10			2	12		[illegible]			351	3	.85	130	2.70
Laura Warren	11		6	5		5	6			6	5	[illegible]		[illegible]	292	2	.68	90	3.25
Carol Waterman	10	10				5			5	5	5	[illegible]		[illegible]	342	4	1.17	[illegible]	2.45
TOTALS	93	[illegible]	13	[illegible]	10	[illegible]	8	6	15	75	18	[illegible]		55	2132	58	2.35	1073	[illegible]

Type of Document	Type of Input	Output Form	Lines (Classification)
L Letter	D Dictated	FC Final Copy	O Original Dictation
M Memo	L Longhand	RD Rough Draft	RP Repetitive Playback
R Report	PR Prerecorded		RV Revision
S Statistical	RD Rough Draft		

LPM = Lines Per

SEMESTER REVIEW OF WEEKLY CONTROL SUMMARIES
Word Processing Services
Spring Semester 1980

Pam Cummins
Transcriber & Date

Week	Number Trans	Total Lines	Total Errors	% of Error	Total Minutes	Lines Per Min
Feb 18-22	7	187	6	3.21	95	1.97
Feb 25-29						

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*GENERAL GUIDELINES FOR DETERMINING LINE COUNT BASED ON A STANDARD 60 SPACE CHARACTER LINE OF TYPE

For a letter:

- 1 line for the date, inside address, and salutation.
- 1 line for complimentary close, signature block, and reference lines.
- 1 line for each line typed in the body of the letter.
- 1 line for each envelope to be addressed.

For a memo:

- 1 line for each line typed in body
- 1 line for all lines preceding the body (the inside address").
- 1 line for signature, initials, and reference notations.

Tables:

- 1 line for each line typeed including headings, full line rulings and footnotes.

Manuscripts:

- 1 line for each line typed. On a double-spaced manuscript, count only the actual lines of typing. If footnotes are used, the line dividing the body of the manuscript and the footnotes is counted as a line. One line count is allowed for each line of footnote typing.

*Lois E. Petersen and Leonard B. Kruk, "Measuring Typewriting Output," Business Education Forum, 32 (1978), pp. 14, 15

CO-OP GUIDELINES FOR SECRETARIAL AND RELATED PROGRAMS

Several instructional designs are available to the clerical/secretarial office education student which will enable him/her to become eligible for an office education job assignment.

DESIGN ONE

Grade 11	Grade 12	
Preparatory Instruction Approved and Funded Two-Hour Office Block	Approved and Funded One Hour Office Related	Co-op Job Assignment

In Design One, a student may enroll in an eleventh grade two-hour vocationally approved and funded Business/Office Education block if he/she has satisfied the prerequisites for entrance into that specific O.E. Code block; prerequisite options are typing and/or stenography. If the student becomes sufficiently skilled at tasks pertinent to occupations within that O.E. Code block, the student may be placed in a related co-op job assignment in his/her eleventh grade year whenever the teacher and co-op coordinator deem the student ready. The eleventh grade block is considered to be the related class. Job readiness occurs when the student has successfully completed the performance objectives/tasks necessary for the co-op experience and the job duties listed on the training agreement.

In his/her senior year, the student may enroll in a funded twelfth grade one-hour related class in conjunction with co-op.

DESIGN TWO

Grade 11	Grade 12	
Preparatory Instruction Approved and Funded Two-Hour Office Block	Related Instruction Approved and Funded Two-Hour Office Block	Co-op Job Assignment
	*One Hour of a Two-Hour Block	

In Design Two, a student may enroll in an eleventh grade two-hour vocationally approved and funded Business/Office Education block if he/she has satisfied the prerequisites for entrance into that specific O.E. Code block; prerequisite options are typing and/or stenography. If the student becomes sufficiently skilled at tasks pertinent to occupations within that O.E. Code block, the student may be placed in a co-op job assignment in his/her eleventh grade year whenever the teacher and co-op coordinator deem the student ready. The eleventh grade block is considered to be, in that case, a related class. Job readiness occurs when the student has successfully completed the performance objectives/tasks necessary for the co-op experience and the job duties listed on the training equipment.

In his/her senior year, the student may enroll in instruction consisting of one hour of an approved and funded Business/Office Education block related to his/her co-op job assignment. Of course, the student may opt for a two-hour block in the twelfth grade. With technology becoming more sophisticated, and education becoming increasingly expensive, a student truly interested in a business office education career, should strongly consider enrolling in two blocks during his/her high school career.

NOTE: It is the responsibility of the local school district to keep accurate attendance records for all students attending two-hour blocks for only one hour.

DESIGN THREE

Grade 11	Grade 12	
Prerequisites: Typing and/or Stenography	Preparatory and Related Instruction Approved and Funded Two-Hour Office Block	Co-op Job Assignment

In Design Three, a student may enroll in a twelfth grade two-hour vocationally approved and funded Business/Office Education block if he/she has satisfied the prerequisites for entrance into that specific O.E. Code block; prerequisite options are typing and/or stenography. The block is considered to be the related class; and the student may be placed in a co-op job assignment his/her senior year if the co-op coordinator certifies that the student has successfully completed the performance objectives/tasks necessary for the co-op experiences and the job duties listed on the training agreement.

As illustrated, the student has not enrolled in any previous block class; however, he/she may have taken typing or stenography as prerequisites to the twelfth grade block.